

MARKETING TOOLKIT

A GUIDE TO CREATING A WINNING MARKETING PROGRAM FOR YOUR HOME CARE AGENCY

prepared by

HCAF

Home Care Association of Florida
RESOURCES, EDUCATION, ADVOCACY

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INTRODUCTION

As the owner, manager or director of a home care agency, one of your most important challenges is marketing your organization to current and potential new customers. The challenge is finding the time, energy and resources to develop a consistent and effective marketing program and keeping it running throughout the year.

One of your challenges is promoting quality home care throughout our state. According to the Pepper Institute on Aging and Public Policy's "Florida's Aging Population" 2007, report increasing wellness and longevity have changed both the expectations and the realities of an aging society. Florida's older population (people aged 60+) has grown to more than 23 percent of the state's total population, and Florida is poised to soon overtake New York as the third most populous state. Other facts from the report include:

- Florida is among the most rapidly growing states in the nation.
- For years, Florida has been regarded as a haven for people seeking sunshine and leisure in their later years.
- A steady influx of older residents from other states, combined with longer life spans among more recent cohorts of retirees, have made Florida the oldest state in the country.
- In 2000, 31 counties in the U.S. had both more than 20 percent older population and more than 10,000 people aged 65 and over. Among them, 19 (61%) were in Florida, including Palm Beach, Pinellas, Lee, and Sarasota counties.
- The counties with the largest percentages of people age 65 and older in Florida are Charlotte (35%), Highlands (33%), Citrus (32%), and Sarasota (31%).

With so many older people in our state, it is clear our services will be needed more and more. Therefore, getting our message out is even more important.

This toolkit will give you the information you need to develop a solid marketing program. It includes tips on using media relations to get your story in your local newspaper or on your radio or television station. You'll find instructions on how to develop your marketing materials, improve your public relations and host special events.

With a solid plan and discipline, you will be able to develop a marketing program that will deliver solid results to your agency's bottom line.

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WORKING WITH THE MEDIA

One of the least expensive ways to gain publicity for your agency is through publicity in the local press. A positive article in the local newspaper, a good feature story on your local television station or an interview on your local radio station are all excellent ways to let the general public learn about your business. In fact, research has shown that a positive article in a newspaper is much more credible than an advertisement that you pay for in the same publication.

Although it will take time, planning and careful execution, positive publicity can be worth thousands of dollars. So be sure to develop a plan to use good media relations positively and effectively.

HOW TO GET A STORY IN THE NEWSPAPER

Getting your business written about positively in your local newspaper is one of the best ways to publicize your business. Newspapers receive hundreds, if not thousands of solicitations every day from businesses, organizations and individuals – all trying for the same thing – to get free publicity.

You may hear colleagues complain that the local newspaper will not take their stories, that the media isn't interested in their "write-ups," or that the media can't be trusted. All of these comments are untrue and may be caused simply because the person submitting the news is not approaching the reporter correctly.

Here are a few tips for getting your news picked up in the local newspaper.

Be sure you are talking to the correct person at the newspaper. Most large city newspapers have a health writer or editor. For home care stories, you'll probably want to talk with him or her. You may also want to pitch your story to the business editor if your story is related to a business event (growth or expansion of the business, an award received by your agency, or contributions you made to charities in the community).

Smaller daily and weekly newspapers generally have a small staff and one person does many jobs. Ask who covers health care stories and try to meet that person.

Position your organization as a resource for the reporter/editor. Reporters for your local newspaper are always looking for local experts they can interview to give the "local angle" to a national or state story. Meet with your local reporters or editors and give them your organization's phone number and a list of topics that you can discuss.

Topics might include:

- Why it is important to have care in the home
- How home care assists the family
- How to select a home health care provider
- How to make the decision about caring for your loved one in the home
- Resources for members of the "sandwich generation" (people caring for

their children and their elderly parents)

- Questions to ask a physician or pharmacist about drug interactions
- 10 tips to make a home safer for elderly individuals (removing obstacles in the hallways, clearly labeling medications...)

Then when a reporter calls, be prepared to respond to the question. Don't feel that you must respond immediately. If a reporter calls you, it is acceptable to ask what questions he or she has and tell him or her you will call back. Ask them when their deadline is, so you can call back in a reasonable amount of time. Generally you'll want to get back to them that day. Take a few minutes to think about your answer and be sure it expresses what you want to say. Jot down some notes so you'll have them in front of you when you call back.

Another approach is to ask the reporter to e-mail questions to you and respond via e-mail. This is a good way to be sure you are truly saying what you intend to say.

Remember to keep your message short and sweet. Avoid acronyms and industry jargon. Use every day language to explain your message as if you were talking to a friend or family member. Keep it simple and easy to understand.

Prepare news releases only when you have something that is newsworthy. One of the main reasons news releases don't get picked up in the newspaper is that they are not newsworthy. Be sure you send releases only when you have important news to report. If you're sending news releases out every week, your releases will wind up in the "circular file," as the reporter will begin to ignore what you send, expecting it to be non-news.

Be sure your story is legitimate and timely. Don't waste a reporter's time by saying "we're having a meeting at our office and think you might want to cover it." You should be able to explain why the reporter's readers would be interested in the meeting, who will be there, what will be discussed, why it is important and what impact it has in your area.

Examples of news include:

- change of leadership in your agency
- award received by your agency or one of your managers or employees
- a comment that relates to a current event and the home care industry
- new management/officers hired
- you are holding a seminar, workshop or event that is open to the public
- you are going to hold a special event that is related to a major holiday, celebration or public event.

HOW TO BE FEATURED OR INTERVIEWED BY YOUR LOCAL TELEVISION OR RADIO STATION

Many of the strategies you use in dealing with newspaper reporters work as well with the broadcast media. Here are some tips for working with TV and radio stations.

- Find out if your local TV and radio stations have dedicated reporters for health care issues.
- Find out if your local TV or radio stations have interview, community events or other talk shows. Find the name of the producer or host of the show and ask how you can get on the show.
- Use the attached list of story ideas to suggest topics for an interview or feature story.
- When calling a TV station, ask to talk with the assignment editor for suggesting a news story. Be sure to call several days in advance of an event and then call the day of the event or the day before the event to remind the assignment editor about your story.
- Remember, your story may get booted if a major news event happens that day.
- Try to create a good visual for TV. A meeting with a speaker does not make for good video. But a clown and children or a foot race is much more visually interesting. Be creative!

SUGGESTED STORY IDEAS FOR RADIO OR TELEVISION FEATURES/INTERVIEWS

- Why home care is important
- How to hire a home care agency
- How to make decisions about caring for a family member
- Resources for members of the “sandwich generation” (people caring for their children and their elderly parents)
- Questions to ask a physician or pharmacist about drug interactions
- 10 tips to make a home safer for elderly individuals (removing obstacles in the hallways, clearly labeling medications...)

SAMPLE PRESS RELEASE

For more information contact:

Jen Smith
Home Care Agency of the World
333 NW 33 St.
Paradise, FL 33333
(800) 888-8888

Local Home Care Agency Celebrates National Home Care Month with Seminar: How to Select a Home Care Agency

PARADISE, Florida – [November 2, 2008] How do you hire a home care agency when you need help caring for an ill family member at home?

That’s the question the Home Care Agency of the World will answer at a free seminar for Paradise residents. The one-hour seminar will be held at Grace Church, 4444 NW 44 St., at 7:00 pm. on Thursday, Nov. 20, 2008. The seminar is open to the public and refreshments will be served.

“We understand how difficult it is to bring someone in your home and how important it is to make the right selection,” said Bill Nelson, chief executive officer of Home Care Agency of the World. Seminar participants will receive a free brochure that outlines questions to ask a home health agency when you are considering hiring them.

According to the Pepper Institute on Aging and Public Policy’s “Florida’s Aging Population” 2007 report, increasing wellness and longevity have changed both the expectations and the realities of an aging society. Florida’s older population (people aged 60+) has grown to more than 23 percent of the state’s total population, and Florida is poised to soon overtake New York as the third most populous state.

“The home care nurses and physical therapists have made a world of difference to my husband,” said Janeene Wilson, wife of Bill Wilson who has been receiving home care services for three months. “With their help we are able to stay in our home and our daughters don’t have to worry about us.”

The Home Care Agency of the World is a home care agency specializing in caring for the aged and patients with diabetes and physical disabilities. The agency has been operating in Paradise for more than 22 years. For more information, call 800/888-8888.

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SAMPLE PUBLIC SERVICE ANNOUNCEMENT

For more information contact:

Jen Smith
Home Care Agency of the World
 333 NW 33 St.
 Paradise, FL 33333
 (800) 888-8888

Do you have a family member in need of health care at home? If so, find out how to hire a home health agency at a free seminar Thursday, November 20 at Grace Church. The seminar will be held at 7 pm and is free and open to the public. For more details, contact Home Care Agency of the World at (800) 888-8888.

MEDIA RESOURCES IN YOUR AREA

There are several online resources that provide contact information for news outlets in your area, including:

United States Newspaper List: <http://www.usnpl.com/flnews.php>
 Florida Newspapers Online: <http://dlis.dos.state.fl.us/fgils/flnews2.html>

Use these resources and call to be sure you are sending information to the correct person at the media outlet.

LETTERS TO THE EDITOR

One of the easiest and most overlooked ways of getting your story into the newspaper is through a letter to the editor.

Here are some tips to help get your letter in the newspaper.

1. Respond to a current news event that has been reported by your local newspaper.
2. Keep your letter short and simple, generally no more than 250 words.
3. Always sign your name and list your address.
4. If you send your message in an e-mail to the editor, you'll save the editor from retyping your letter. Check your newspaper's Website for the e-mail address of its editorial writer or editor.
5. Identify who you are, especially if your credentials give you more authority in expressing your opinion. For instance, "I have managed a home care agency for twenty years." That statement establishes your experience and credibility.
6. Be timely. Don't respond to a news item that is a month old. Newspapers like to keep readers involved and a healthy debate through letters to the editor is a good way to discuss a current topic. Be sure your comments have not been discussed last week and that you have something new to offer.
7. Use letters to the editor to thank community leaders for leadership or service.

8. Use letters to the editor to announce Home Care Month or Healthy Aging Month.
9. Be sure of your facts and stick to the issue. Be specific and avoid negative comments about specific people. If you disagree with a statement, say why you disagree and support that statement with evidence and information.
10. Whether you sign your letter personally or with your title (President, XYZ Home Care Agency) will depend on whether you are expressing a personal opinion or an official viewpoint of your agency.

CALENDAR OF EVENTS FOR HOME CARE PUBLICITY

February 10-16, 2008	National Cardiac Rehabilitation Week
February 14	National Donor Day
February	American Heart Month
Feb. 15	National Women's Heart Health Day
March 25	American Diabetes Alert Day
March	American Red Cross Month
March 25	Doctor's Day
March 2-8	National Patient Safety Awareness Week
March	National Professional Social Work Month
April 20-26	National Volunteer Week
May	National Arthritis Month
May 11-17	National Hospital Week
May 4-10	National Hug Holiday
May 11-17	National Nurses Week
May 11-17	National Women's Health Week
May 25-31	Older Americans' Mental Health Week
May	Older Americans Month
June 10	Career Nurse Assistants Day
June 9-15	National Men's Health Week
August	National Pain Awareness Month
September	Healthy Aging Month
September 21-27	National Rehabilitation Week
September 24	National Women's Health & Fitness Day
October	National Children's Health Month
October	National Family Health Month
Oct. 12-18	National Healthcare Quality Week
Oct. 20-26	National Health Education Week
Oct. 20-24	Medical Assistants' Week
October	National Physical Therapy Month
November	National Family Caregiver Month
November	National Home Care Month
November	National Hospice Month
December	National Hand Washing Awareness Week

MARKETING YOUR ORGANIZATION

START WITH THE BASICS

Developing a marketing plan for your organization can seem like a daunting task. But if you start with the basics, the plan will not be as difficult as you may think. Here are a few tips to get your started.

- Be sure the person or persons who answer the phone in your office have received training on how to answer properly. Are they smiling when they answer the phone? Do they make a sincere contact with each caller? Do they listen attentively? Although good telephone manners may seem simple, too many organizations leave the telephone to the least trained person on the team.
- At times you can consider using your office as a marketing tool. Invite family members of potential patients to your office and give them a tour of the facility. Introduce them to the key personnel. But if you do employ this strategy, observe the following:
 - Examine your office carefully. Is it clean? Does it make a good first impression? Are files put away and is your reception area neat and orderly?
 - How are visitors and clients greeted at your office? Do you stand and greet them with a smile. Do you shake hands and offer them a drink? Do you welcome them warmly?
- Do your employees know your most important customers and referring sources? If not, be sure to let them know so they will understand why those customers should be treated with appreciation. While you cannot give them remuneration of any type, courtesy and respect are always appropriate and should be standard procedure. A simple "thank you for your business" will go a long way to show that you do not take their business for granted.

KNOW YOUR AUDIENCE: IT'S ALL ABOUT THE CUSTOMER

Your home care agency has three important referral audiences:

- Physicians and their staff (nurses, technicians and administrative assistants);
- Patients and their families; and
- Discharge Planners and case managers.

It is important to continually monitor and track these three groups. You may wish to use a computer program that allows you to assign a numeric code to each member of your audiences so you can easily generate reports to meet your needs. (For example, Dr. John Jones could be typed into your system at different times as Dr. Jones, Dr. J. Jones, Dr. John Jones or John Jones which would then appear as four separate referring physicians when actually it is only one. Instead assign each physician an identification number to avoid confusion, or at least choose a software system that only provides a drop-down menu for staff to use when selecting this type of detail.)

Aside from the basic contact information, document several details regarding your referring physicians, including:

- Specialties
- Office location(s)
- Key staff at the physician's office
- Number and type of referrals sent each month
- Hospital affiliations
- Preferred method of communication
- Interactions with your home care staff (in-service, personal visit)
- Agency communication to the physician (letters regarding patients, invitations to agency events, notices of changes in your services)
- Messages or feedback received from the physician

These details will help you track who is sending the most referrals and monitor relationships that may need special attention if the number of referrals begins to decrease over time.

Also, focus this same amount of attention to your patient audience. Your patients and their families are an excellent resource to increase your business, and it is important that you thoroughly understand this audience. Details you want to capture include:

- How they first learned of your agency (to track the effectiveness of your marketing activities). Was it from a physician, friend, advertisement, news story?
- Type of insurance
- Age
- Home care needs
- Special interests or hobbies

Regularly survey these groups to gauge their level of satisfaction with your organization. Members of your audiences should always be able to provide unsolicited feedback if they have concerns or suggestions they want to share with your team. This can be accomplished by a general e-mail account that is read at least twice a day for each audience, as well as comment cards, toll-free phone numbers and your agency contact information clearly posted on all printed materials and your Website.

You can also monitor the needs of your professional audience by subscribing to association newsletters, attending medical conferences and monitoring industry journals and studies. Local support groups, general media stories and health organizations (American Diabetes Association, American Cancer Society) are great resources to stay abreast of the concerns facing your patients and their families.

DEVELOP A PLAN

Your marketing plan should support your agency's mission and values and be a dynamic document that can be updated based on changes in your audiences or your industry.

When creating the plan, allow time to conduct and define these areas:

- **Conduct research** – understand your patient demographics and physician referral patterns, understand the strengths and weaknesses of your competitors, document your agency's history and future plans.
- **Define your goals** – these are broad statements such as “to enhance our reputation and recognition among physicians in our community”
- **Define your short and long term objectives** – create measurable objectives that address the desired result in terms of opinion change or behavioral outcome for each public within a specified time
- **Select your tools or activities** – design and launch an agency e-newsletter or conduct six patient education seminars during the next year
- **Set your schedule** – determine specific time frames for each activity
- **Determine your budget** – allocate amounts for each tool or activity
- **Select your evaluation methods** – decide how you will evaluate your success, including evaluation methods and data resources

WHAT IS YOUR MESSAGE; WHAT IS UNIQUE ABOUT YOUR ORGANIZATION?

Your entire marketing and communications program should include a clear consistent message about your agency, such as “Our highly trained, compassionate staff provides a full range of home care services to patients in our community.” This key information should be worked into all of your materials, and then you can identify other important messages for each audience.

For example, the medical community will be interested in your communications process to inform them of their patient's progress or status. They will also want to know details about the different types and levels of service you provide, and the accreditations or licenses held by your agency and your staff.

The patients and their families may also be interested in these messages, but for them it may be more important to learn about how many times each week a patient can receive home care services, or ways in which home care services can enable patients to retain their independence and remain in their homes (instead of moving to an assisted living facility).

Your messages should differentiate you from the competition, and whenever possible focus on a unique aspect of your agency – you’ve been helping patients for more than 10 years, your staff holds the highest level of home care certification or the referring physician receives an update on his or her patient’s progress at the end of each week.

KNOW YOUR COMPETITION

One of the most important, and often neglected, areas in marketing is gathering data about your competition. If you don’t know who your competition is and how they operate, you are at a distinct disadvantage when selling your services to a potential new customer.

Ask yourself these questions:

- Do I know who my main competition is?
- What is different about them?
- What are their specialties?
- What are their rates, billing structure?
- What are their strengths?
- What are their weaknesses?
- How do they treat their customers?
- How do they market themselves (print ads, radio, direct mail)?
- How would you describe their identity or brand?

How do you find this information? There are a myriad of inexpensive ways to research your competition. Look at their advertisements. Check out their yellow page listing. Look at their Web site. Ask your customers or friends? With a little digging, you will be amazed at what you are able to find.

Once you have analyzed your competition, think about how you can best compete with them. While you never want to say negative things about a competitor, it is helpful to know their weak areas – so you can talk about how good your agency is in those areas. (Be sure you are honest about what you can do and don’t over-promise.)

Be sure to assess your competition on a regular basis. Don’t assume a one-time analysis will suffice. Watch your competition frequently, know how they are marketing and what customers they are working with. You may find a way to take advantage of changes in personnel or services at your competition if you are alert and pay attention to what is happening in the marketplace.

SAY "THANK YOU"

Showing appreciation to your customers is one of the best ways to retain customers and grow your business. It is much easier to get new business from an existing customer than to cultivate a new customer and earn their business.

Think about how you say "thank you" for their business. While a thank you gesture cannot consist of any remuneration, it should not be ignored. Here are a few simple ways to show appreciation and at the same time, put your name in front of your customers.

- Send a thank you card.
- Sponsor a renowned physician speaker and invite the local physician community to attend.
- Send a holiday card.
- Sponsor a community health care professional speaker's forum designed to attract discharge planners and case managers.
- Send a birthday card.
- Host an annual community appreciation event (an ice cream social, a dessert party, a light luncheon or wine and cheese reception) and invite all the various groups in the community with whom you interact.
- Sponsor a community health event, such as a Walk to fight a specific disease with which many of your patients have to deal.
- Sponsor some other charitable event. Many United Way agencies are usually looking for companies to sponsor a breakfast or social hour.

HOW TO BRAND YOUR HOME CARE ORGANIZATION

DEVELOPING YOUR IDENTITY

Successful branding is based on creating a long-term vision for your agency and implementing processes and standards to meet that objective. Your brand is your overall identity – from your name and logo to each collateral piece and communications message. The brand is who you are as an organization, and you must ensure that you are meeting that description each time you interact with your external and internal audiences.

To fully develop your brand you must completely examine your organization and identify its strengths and weaknesses, and succinctly define the types and levels of services you provide. Several marketing and branding agencies have developed processes to help organization's define their brand by extensively researching the organization and working with all levels of employees to answer the questions, "Who are we and what do we truly provide to our customers?"

After defining your brand, you will need to develop collateral materials to market your agency. (Every print piece should include your contact information and your Website.) Some basic print pieces include:

- Agency brochure
- Business cards
- Informational brochure about home care services (typically for the patient audience)
- One-page insert sheets with detailed information regarding your staff, various services, caregiver process
- Agency presentation folder

With a significant investment in the design and creation of your brand, be sure you monitor how your logo and brand are used. You might ask your marketing firm to help you develop "graphic standards," a guidebook that explains details about the use of your logo on all printed materials. The graphic standards will list type fonts, sizes, placement, colors and show examples of how the logo should be reproduced.

A good logo/identity should work for an organization for 7-10 years, so it is important that the logo is reproduced accurately and correctly.

Before creating any collateral materials, you (or your marketing agency) should complete a "creative brief" for the project. Creative briefs include the essential information for each project and will help you meet your marketing objectives.

A creative brief will include several questions about the project, such as:

- Why are we initiating this project?
- Who is the audience?
- What is our essential message to share with this audience?
- Why is this information important to our audience?
- What action(s) do we want them to take?

- How will we measure the success of this project?
- Who needs to approve this content/project?
- What is our deadline?
- What is our budget?
- How many copies do we need?
- How will this be distributed?
- What agency contact information will be listed on the materials?
- How often will this need to be updated?

CREATING YOUR AGENCY BROCHURE

Your agency should create collateral materials or a general information brochure that:

- Provides an overview of home care services, including what assistance can and cannot be provided by home care staff
- Communicates the unique features and areas of specialization provided by your agency
- Emphasizes the compassion and professional experience of your staff
- Includes a section for caregivers explaining how they can most effectively work with your team
- Explains how to contact your agency, including phone, e-mail and Website.

These brochures should be distributed to patients, potential patients and members of the community at community health fairs, speaking engagements, newcomer welcome packets and physicians' offices.

Depending on your budget, you also may consider creating a separate brochure with more advanced explanations of your services that is geared toward your medical audience. These brochures should be distributed to your potential referring physicians and included in your marketing efforts at healthcare conferences.

Tips on reproduction/printing

Ask your marketing agency for assistance in determining a reasonable budget for your brochure printing. There are a huge range of formats, paper stocks, ink colors and printing techniques to consider.

One of the best ways to save money in printing is to create a brochure that will last 3-5 years. Then you can amortize the cost of the brochure over several years. Printing a new brochure every year or so is not only costly, but generally unnecessary. Printing in larger quantities will also bring your unit cost down. Think about how many copies you will need each month, then multiply by 12 and then multiply that number by 3-5. That should tell you the quantity you will realistically use.

If you need less than 1000 copies, consider printing in two- or three-color, rather than full color to keep costs down. Full-color printing is most economical in quantities over 1000 and you'll see real savings when you print several thousand copies.

How to use your brochure effectively

Now that you have a brochure, be sure you use it. Give it to:

- Potential new customers
- New employees
- Referring physicians
- Hospital case managers
- Community leaders at speaking engagements
- Attendees at health fairs
- Customers at thank you events

You may also want to direct mail your brochure to potential customers. If so, ask your marketing agency to be sure the brochure will go through the mail as cost-effectively as possible. Many organizations have two brochures – one they use for a first contact and one that is a bit more elaborate and has more detail for customers who are more seriously considering hiring you.

CREATING YOUR AGENCY NEWSLETTER.

One of the most effective and inexpensive ways of staying in touch with your customers and potential new customers is regularly communicating with them through an agency newsletter. Newsletters are easy to read, easy to create and a good way to communicate important news, changes, activities. The newsletter doesn't need to be elaborate. A simple one-page 8 ½ x 11" format works fine. Or if you want to create something with room for more information and photos, you might consider a four-page format. (11 x 17" folds to four 8 ½ x 11" pages).

Before you begin your newsletter, think about what you would like to achieve with its publication.

- Do you want to grow your business by 5%?
- Do you want to gain 5% more recognition in your community?
- Do you want to attract 10% more employees?

Think carefully about how you will use the newsletter, who in your organization will be responsible for it and whether you need assistance from an outside communications or marketing firm.

How often will the newsletter be published and how will you distribute it? If you start with a plan that is well thought out, you will have more success with the newsletter.

Suggested Content

Newsletters are meant to be concise and easy-to-read.

Content may include:

- News about new employees
- Success stories (be sure to get permission from your patients to use their story or quotes)
- New services offered
- Tips for your readers (how to hire a home care agency; how best to communicate with your caregiver, etc.)
- Important dates or announcement of events/fairs, etc.
- National or state news that affects home health care or your area

How to reproduce your newsletter

Using a template that is preprinted is a good way to save money on your newsletter. Have your marketing agency design a front-page format with your flag (the nameplate of your newsletter) pre-printed in a color. Print enough copies for a year or two and then simply print onto the pre-printed sheets every issue in black ink. This is an easy way to keep costs down and still produce an attractive and high quality publication.

How to distribute the newsletter

Take time to draw up a complete list of those who would benefit by receiving your newsletter. Don't forget:

- Local community leaders
- Legislators
- Hospital administrators
- Employees and their families
- Patients and their families

You can distribute personally as you make sales calls to your customers or potential customers or mail copies using a Business Permit that can be obtained through the local post office. Use of a permit gives you preferred postal rates.

Evaluating your newsletter

Whether you evaluate your newsletter formally or informally, take some time every year to find out how effective it is.

Create a readership survey to ask readers for their input or hire a professional to evaluate your publication for you. Evaluate:

- Are we getting our message across?
- Is the newsletter meeting its objectives?
- How do our customers like the newsletter?
- Is the newsletter worth its cost?

Take a critical look and then make changes if necessary to keep information fresh, relevant and interesting.

DEVELOPING A WEBSITE

As you know, consumers are using the internet to research their medical options and gather valuable information about businesses and services available in their communities. Developing a well-organized, easy-to-read Website is an essential piece of your marketing program and will enable individuals to quickly gather information about your agency.

Websites have three basic components:

- **Architecture:** how you organize the information, the headings/section or navigation
- **Content:** the information and messages
- **Design:** colors, fonts and images that match your print collateral materials

Because creating a Website can involve a great deal of time and specific technical expertise, you may want to contract with your marketing agency to create and construct your Website.

Think about the following factors when developing your Website:

- What information needs to be on the site?
- How will people use your site?
- Can you save time and money by doing some tasks via your Website?
- Who on your staff is responsible to develop the content and maintain the information?
- How will you measure the success of your Website? You will want to create the site with resources to track the number of visitors to each page, and we suggest that you determine a way to capture their contact information (possibly by having them sign up for a free electronic newsletter) to build a database of individuals interested in your agency.
- What is the look and feel your site should have?

Successful Websites are designed to help the visitor quickly find information, and should contain:

- Search capability prominently displayed
- Your agency contact information on every page
- Short paragraphs (only 2 – 3 sentences) and bulleted lists
- Small-sized images that quickly download from your site
- Printer-friendly versions of your information (consider using 10-12 point type since many of your Website visitors may prefer larger print)
- Messages consistent with your other marketing and communications materials
- A list of the government agencies and associations that regulate/certify your agency (complete with links to their Websites – be sure that the links open to new windows in the Web browser and never take a visitor away from your Website)

SPECIAL EVENTS

A special event is a great way to increase awareness of your organization while building lasting relationships and increasing referrals. These events can be held to introduce key staff to local healthcare professionals, announce new services or celebrate occasions such as National Home Care Month (November). (Remember, you need to appeal to a broader audience than just your referral sources so you are not considered to be giving remuneration that is contrary to Chapter 400, Part III, our home health licensure law.)

GETTING STARTED

First, you'll want to plan a budget for your event. Be sure to allow funds for invitations, food, publicity, speaker fees and expenses, equipment rental (if needed) and decorations at the event. Plan far enough in advance so that you will have time to assemble all the resources and give your invitees plenty of time to put the event on their calendars (usually 2-3 weeks in advance of the event).

GOALS AND OBJECTIVES

Once you've determined your budget, the next step is to outline the goals and objectives for the event.

For example:

Goal – to expand your referral base to include new physician groups.

Objectives – to secure attendance from four new physician groups and to schedule follow-up meetings with two of those attendees.

Note that the objective is measurable in some way. This will help you know if you have been successful with your event.

ENSURING GOOD ATTENDANCE

When planning a special event it is important to know your audience and understand the best way to secure time on their calendars. You may not be a morning person, but sometimes a sunrise celebration is the best way to ensure good attendance before professionals arrive at their offices and start their daily routines. Some groups prefer to take an extended lunch break and welcome an invitation to an event held in the middle of the day. Make sure to research your target audience and understand their preferences and time constraints before scheduling your event.

PLANNING THE EVENT

You also need to consider the best format for your audience. Sometimes an event scheduled around a meal is appropriate, or you may want to consider hosting a less formal “open house” for a few hours in the evening. If you are serving a meal you need to provide seating for all attendees, but an event with hors d’oeuvres and refreshments can be facilitated with high-top tables and a few chairs.

When selecting the date, be sure to review the local academic and community calendars (you don’t want to compete with any charity or sporting events). Also verify that there are not any industry conferences or meetings scheduled at that time. If planning a weeknight event, consider avoiding Wednesdays because many religious groups gather mid-week. It is generally best to avoid Friday nights as well, as many people begin their weekends on Friday afternoons.

LOCATION

The special event can be held at your office, or an interesting location in your community. A few options to consider include:

- Science, art or other museums
- Aquariums or zoos
- Restaurants with private rooms
- Sport facilities
- Wineries

While considering locations, remember to verify that the facility can accommodate the maximum number of guests you expect to attend. Your site should be easy to locate and provide:

- Convenient parking
- Ample seating or meeting space
- Audio visual resources
- Kitchen or refrigeration for your food and refreshments
- A reception or welcome area where you can greet your guests

INVITATIONS

Invitations should be mailed to your guests two to three weeks prior to the event. Make sure that you have confirmed each invitee’s name and credentials, and then have someone else double-check that information. (You cannot assume that Terry Smith is a man, or that Leslie Jones is a woman.) If you are not sure of an individual’s name or credentials, do not hesitate to call to verify the information.

Your invitations play a key role in determining the success of your event. Choose a design that matches your theme or venue, and a type font that is easy to read. Always verify that your invitations provide all necessary information to your invited guests, including:

- **Who:** your agency name (and possibly your logo).
- **How many:** clarify if the invitation is for one individual, the attendee and a guest or their entire staff/team.
- **What or why:** clearly explain the special event – an open house, an annual meeting, a continuing education opportunity.
- **Where:** provide the name of your location, the address and directions or a map if necessary.
- **When:** include the day of the week, the date and the start and end times of your event.
- **Dress:** some events – such as a holiday party or evening reception – require that you list the appropriate dress code for attendees (business casual, formal, etc.).
- **Type of refreshments:** always let your guests know the type of food you will be providing during the event (a meal or hors d’oeuvres).
- **RSVP deadline and contact person:** it is acceptable to set the RSVP deadline three to seven days before your event. The individual responsible for receiving the RSVPs should (once again) verify the respondent’s name/credentials (for nametags or future correspondence) and be familiar with the event details in case your guest has any questions.

ADDITIONAL DETAILS

As you plan your event, there are a few other details to consider:

- **Event program or schedule:** if you will be providing a speaker or presentation, your guests will appreciate a brief outline letting them know what to expect during your event.
- **Food and refreshments:** make sure you are providing a variety of options for your guests. If your event includes a sit-down meal, you should have a vegetarian option available. If your guests will enjoy hors d’oeuvres, select items that are easy to eat with one hand and (if possible) do not require a utensil.
- **Agency signage:** invest in a nice, cloth table cover with your name and logo for the welcome table, and consider placing an agency banner or other signage at the event. If you are providing nametags, you can add your agency logo, as long as it does not make it difficult to read your attendees’ names.

EVALUATION AND FOLLOW-UP

The day after your event, it is important to schedule time to evaluate whether or not you met your goals and objectives. Create an event summary that lists:

- Your invitation list and the individuals (and their organizations) that attended your event.
- Your expenses for each category (location, refreshments, invitations and communication, etc.).
- Everything that went well, and the details you will change for future special events.

It is important to follow-up with your guests soon after the event. Make time to send a short note thanking them for their attendance enclosed with information about your agency.

HEALTH FAIRS OR MEDICAL CONVENTIONS

Local health fairs or medical conventions provide a great opportunity to increase awareness regarding your agency. As with planning special events, it is important to know your audience and evaluate the expected attendees to determine if the opportunity is right for your agency.

Once you have decided to participate, you will need:

- Informational brochures or collateral materials
- Table-top display or stand alone booth (the group organizing the event will inform you of the appropriate size)
- Cloth table cover with your name and logo for the welcome table
- Gifts (pens, notepads, coffee mugs, calendars) for individuals who visit your booth
- Candy or mint bowl for your table
- Ample supply of business cards

Many organizations provide an attendee list to exhibitors or sponsors prior to a conference or seminar. You can use this information to send a brief invitation to key individuals that you want to visit your booth. This list also is helpful after the event to continue corresponding with potential referral sources.

LOW COST MARKETING IDEAS

There are several inexpensive ways to market your agency and raise awareness regarding your services.

ANNUAL EVENTS

During the year you have several opportunities to communicate with your target audiences and provide them with items carrying your agency name, logo, Website and contact information. A few examples include:

- **National Home Care Month (November):** send your clients (and potential clients) a magnet attached to a direct mail piece to celebrate this annual observance. The magnet can be removed from the card stock and kept for future use.
- **Holidays:** consider sending Thanksgiving or general “holiday season” cards in mid-November. Most medical offices receive countless cards during December that often get lost in the shuffle, and you can strengthen your relationships by beating the holiday rush. Make sure all cards are signed with a personal message to the recipients.
- **New Year:** calendars (wall or desktop) can be personalized to promote your agency and distributed for a minimal cost. These can be mailed alone, or with your holiday card, and each page should include your name, logo and contact information.
- **National Doctor’s Day (celebrated March 30) and National Nurses Week (celebrated May 6 – 12):** the physicians and nurses working at your referral locations will appreciate a card with a nice note of appreciation.

POSTERS AND FLYERS

Professionally designed print materials also can help market your agency. Create an educational series of posters or flyers and distribute them to your referring audiences on a regular basis (monthly, every other month or quarterly). Topics can include:

- Caring for elderly patients
- Warning signs for diabetes
- Pediatric patients requiring home care services
- Identifying Influenza

These materials also should be saved as electronic files that you can e-mail to interested individuals and post to your Website.

ELECTRONIC NEWSLETTERS

If the members of your target audience frequently check their e-mails, an electronic newsletter may be a great way to stay in touch with them. These newsletters should be short (one to two pages) and contain timely information regarding your agency and the home care industry. The articles should link back to your agency Website and contain a method for the readers to contact you if they have questions or would like additional information.

PROFESSIONAL PUBLICATION ARTICLES

Just as you are working to find cost-effective methods to market your agency, medical and professional associations are striving to stay in touch with their members. These groups typically have weekly or monthly member newsletters (print or electronic) and welcome submitted articles to build their content.

Research these opportunities, review the types of articles in their publications and then contact their communications staff to offer your assistance educating their members about home care services. Your articles must contain general facts and information about your industry – and not directly promote your agency – but you can include a quote from a member of your team (to get your agency’s name in the article) and ask for a by-line in the publication. This same type of marketing effort can be used to provide content for association Websites.

Be sure to find out the publication’s deadline schedule so you can submit your article in a timely manner.

Also pay attention to the publication’s style of writing. You’ll want your article to be written in the same tone and style.

SPEAKER’S BUREAU

One of the most cost-effective ways to market your agency is to create a speaker’s bureau. Presenting information to local clubs, churches, service organizations and professional groups gives you the opportunity to directly interact with these audiences and generate great word-of-mouth marketing for your agency.

When developing a speech or presentation for these groups, keep in mind the following tips:

- Research your audience carefully. Be sure you understand who they are, what interests they have and how much they know about your topic.
- Check carefully with your contact to be sure of the exact time, date and location of the meeting.
- Get to the meeting early especially if you have equipment that needs to be set up.
- Find out the time restrictions on your talk. Many service clubs end promptly at a designated time. You’ll want to leave time at the end of your talk for questions and answers. So be sure to time your presentation carefully.
- Bring materials with you to the meeting, such as your agency brochure or a fact sheet on how to hire a home care agency. Be sure your agency name and phone number are included on all materials.

HOME CARE RESOURCES

WHAT IS HOME CARE?

Home care is the term used for health and social services delivered at home to persons who are recovering from an illness or injury or who are disabled, chronically or terminally ill. These patients are in need of medical, nursing, social or therapeutic treatment and assistance with the essential daily living activities.

A person generally receives home care when he or she prefers to stay at home but needs care more than can be provided by family and friends. As people age, many prefer to live independently at home and often elect to receive home care rather than moving to a nursing home or assisted living facility.

Home care is also chosen for disabled young adults and those recuperating from acute illness. Chronically ill infants and children can receive sophisticated medical treatment in their loving and secure home environments. Both adults and children diagnosed with terminal illness also are being cared for at home, receiving compassion and maintaining dignity at the end of life. As hospital stays decrease, increasing numbers of patients need highly skilled services when they return home. Other patients are able to stay at home to begin with, receiving safe and effective care in the comfort of their own homes.

Home care services are available 24 hours a day, seven days a week. Depending on the patient's needs, these services may be provided by an individual or a team of specialists on a part-time, intermittent, hourly, or shift basis. The following professionals, paraprofessionals and volunteers may be involved in home care treatment:

- Physicians
- Registered nurses (RNs)
- Licensed Practical Nurses (LPNs)
- Physical therapists (PTs)
- Social workers
- Speech language pathologists
- Occupational therapists
- Respiratory therapists
- Dietitians
- Dentists
- Home Health Aides
- Homemaker and chore workers
- Companions
- Volunteers

A number of different organizations provide home care to a patient. They may include:

- Home health agencies
- Nurse Registries
- Hospices
- Homemaker and home care aide agencies
- Staffing and private-duty agencies
- Pharmaceutical and infusion therapy companies
- Durable medical equipment and supply dealers
- Independent care givers

HOW TO HIRE A HOME CARE AGENCY

Whether you are a physician, a case manager or family member, selecting the right home care agency is an important part of caring for your patient or loved one.

First, ask for the names of several home care agencies. Then find out more information about their services and reputation by asking questions and doing some simple research.

Here is a checklist of questions to ask the agency and others who may have experience with the home care agencies and know about their track records:

- How long has the agency served your local community?
- Does the home care agency supply literature explaining its services, eligibility requirements, fees, and funding sources? Many providers furnish patients with a detailed “Patient Bill of Rights” that outlines the rights and responsibilities of providers, patients, and caregivers alike. An annual report and other educational materials also can provide helpful information about the agency.
- How does the agency select and train its employees? Does it protect its workers with written personnel policies, benefits packages, and malpractice insurance?
- Are nurses or therapists required to evaluate the patient’s home care needs? If so, what does this entail? Do they consult the patient’s physicians and family members?
- Does the agency include the patient and his or her family members in developing a plan of care? Are they involved in making care plan changes?
- Is the patient’s course of treatment documented, detailing specific tasks to be carried out by each professional caregiver? Does the patient and his or her family receive a copy of this plan, and do the caregivers update it as changes occur? Does the agency take time to educate family members on the care being administered to the patient?

- Does the agency assign supervisors to oversee the quality of care patients are receiving in their homes or give the patient the option of ordering supervisory visits? If so, how often do these individuals make visits? Who can the patient and his or her family members call with questions or complaints? How does the agency follow up on and resolve problems?
- What are the financial procedures of the agency? Does the agency furnish written statements explaining all of the costs and payment plan options associated with home care?
- What procedures does the agency have in place to handle emergencies? Are its caregivers available 24 hours a day, seven days a week?
- How does the agency ensure patient confidentiality?
- Does the home health agency belong to the Home Care Association of Florida, its state trade association?

In addition, ask the home care agency to supply you with a list of references, such as doctors, discharge planners, patients or their family members, and community leaders who are familiar with the agency's quality of service.

Contact each reference and ask:

- Do you frequently refer clients to this agency?
- Do you have a contractual relationship with this agency? If so, do you require the agency to meet special standards for quality care?
- What sort of feedback have you gotten from patients receiving care from this agency, either on an informal basis or through a formal satisfaction survey?
- Do you know of any clients this agency has treated whose cases are similar to mine or my loved one's? If so, can you put me in touch with these individuals?



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