



BREAKING THE GROWTH BARRIER

Why Great Home Care
Agencies Stop Growing...
Even When Demand
Keeps Increasing



STRONGER TEAMS



BETTER CARE



SUSTAINABLE GROWTH

52weeks
marketing

HELPER
HEROES

MARKETING *Drives* GROWTH.

**INFRASTRUCTURE
MAKES IT LAST.**

A STRONGER, MORE PROFITABLE
HOME CARE AGENCY. **TOGETHER.**



52 WEEKS MARKETING

- ✓ Attract Referrals
- ✓ Build Your Pipeline
- ✓ Increase Conversions

*Strategy
that Delivers.*



HELPER HEROES

- ✓ Virtual Support
- ✓ Build Capacity
- ✓ Increase Profitability

*Support
that Scales.*



**GROW
SCALE
THRIVE**

**LET'S BUILD
WHAT'S NEXT.**



**SCHEDULE A
DISCOVERY CALL**

EXPLORE. PLAN. GROW.

PEOPLE | PROCESS | GROWTH | TOGETHER

Brought to you by....



52weeks[®]
marketing

HELPER
HEROES

When a Home Care Agency Reaches a Growth Crossroad...

The Growth Infrastructure Blueprint™ meets you where you are.



"I'm Building My Foundation"

(Startup office with owner wearing multiple hats.)

- Owner does everything
- One or two office employees
- Processes are still evolving
- Every hire feels expensive
- Growth depends on the owner

**Build the right infrastructure
before burnout begins.**



"We've Built a Team... Now We Need to Redesign It"

(Mid-sized office with several leaders working together.)

- Several office staff
- Everyone is busy
- Leaders wear multiple hats
- Bottlenecks slow growth
- Growth begins to plateau

**Free your best people to do
their highest-value work.**



"We've Grown...Now Complexity is Slowing Us Down"

(Larger agency with multiple leaders, departments, or markets.)

- Leadership can become bottleneck
- Roles overlap across departments
- Systems don't always scale consistently
- Decisions get slower as complexity grows
- Growth - stronger leadership infrastructure

**Build an organizations that can scale
beyond its current structure.**

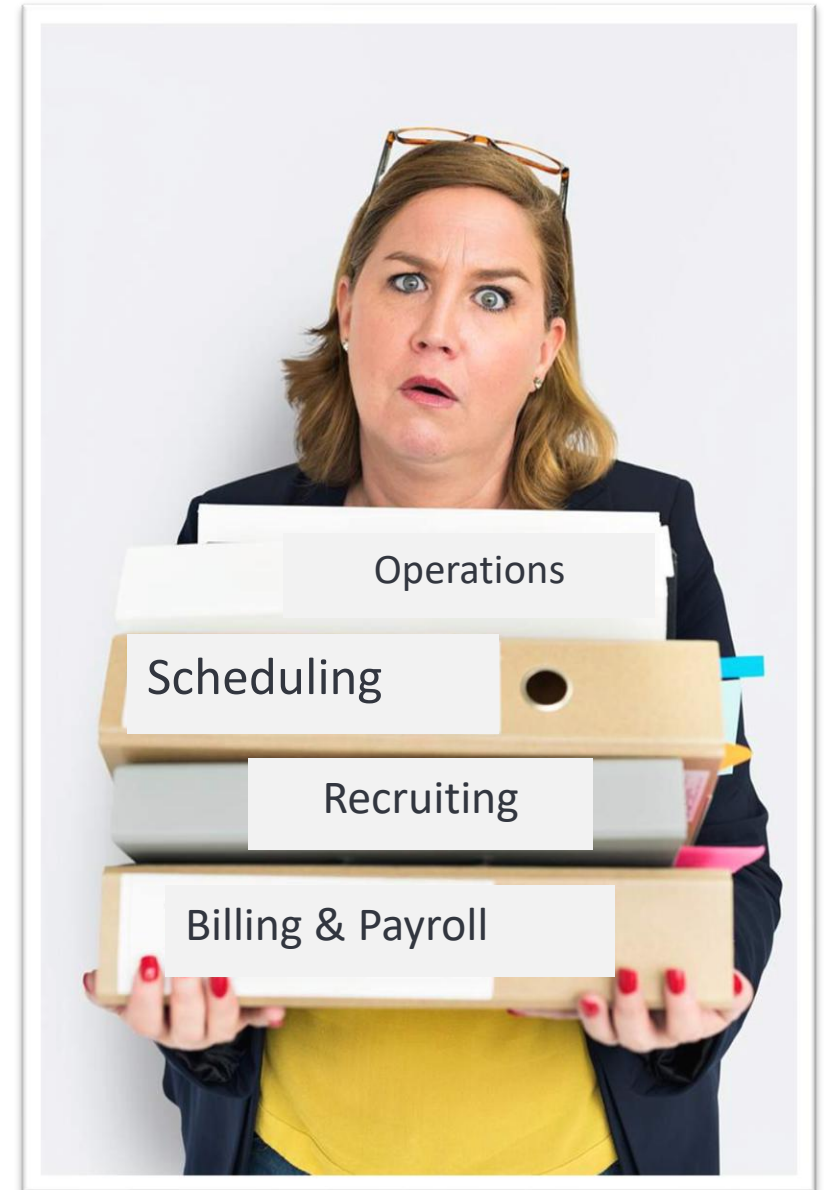
Typical BUILD Phase – Org Charts



The Growth Barrier Sounds Like This...

"I'm only one person....

Between me and my small staff, it's feast or famine. I can't afford to hire another person because my revenue isn't consistent enough."



THE EARLY-STAGE GROWTH CHALLENGE

A Few Steps Forward. A Step (or Two) Back.

Early-stage home care agencies experience a cycle of inconsistent growth because the infrastructure isn't strong enough to sustain it.



COMMON GROWTH BARRIERS



All attention goes to staffing and caring for current clients



Marketing and recruiting get pushed aside



Owner wears too many hats

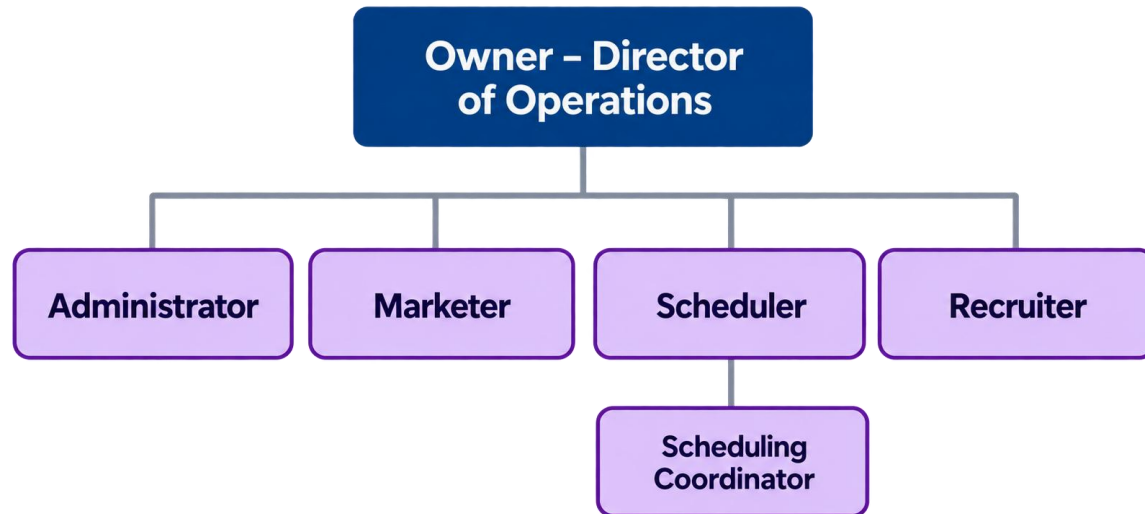


No time to build processes or systems

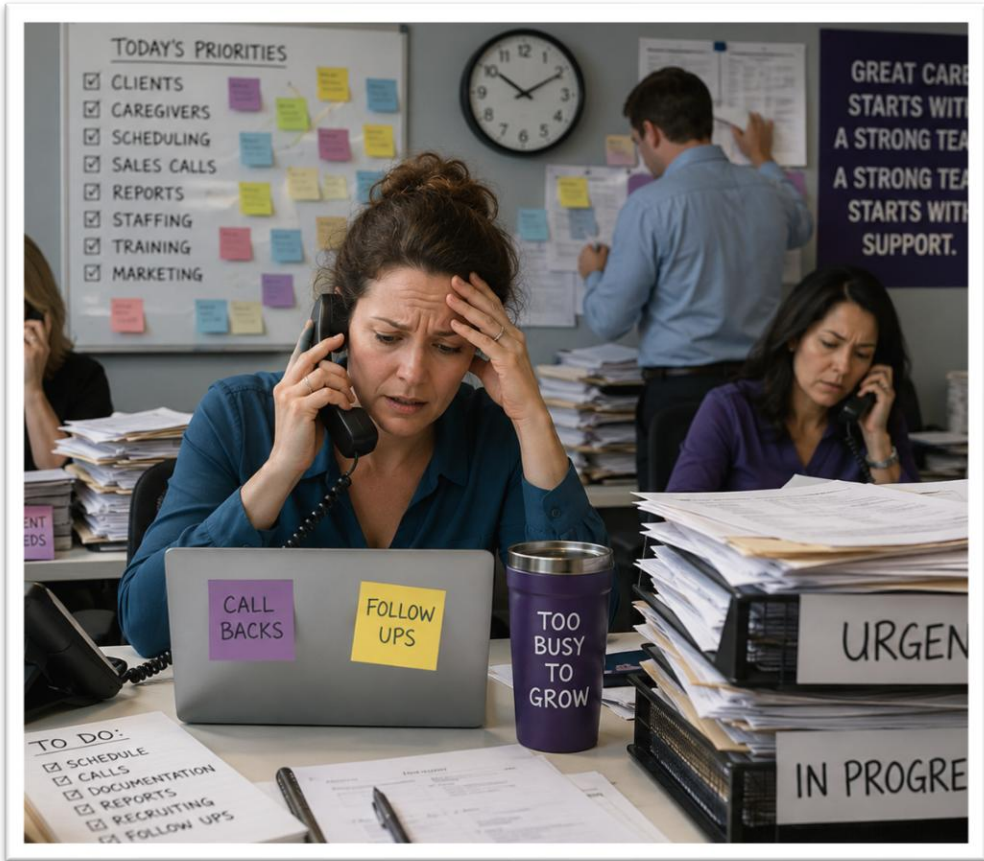


Growth depends on the owner, not the business

Typical Optimize Phase - Org Chart



Symptoms of Hitting the Growth Barrier



You may recognize a few of these...

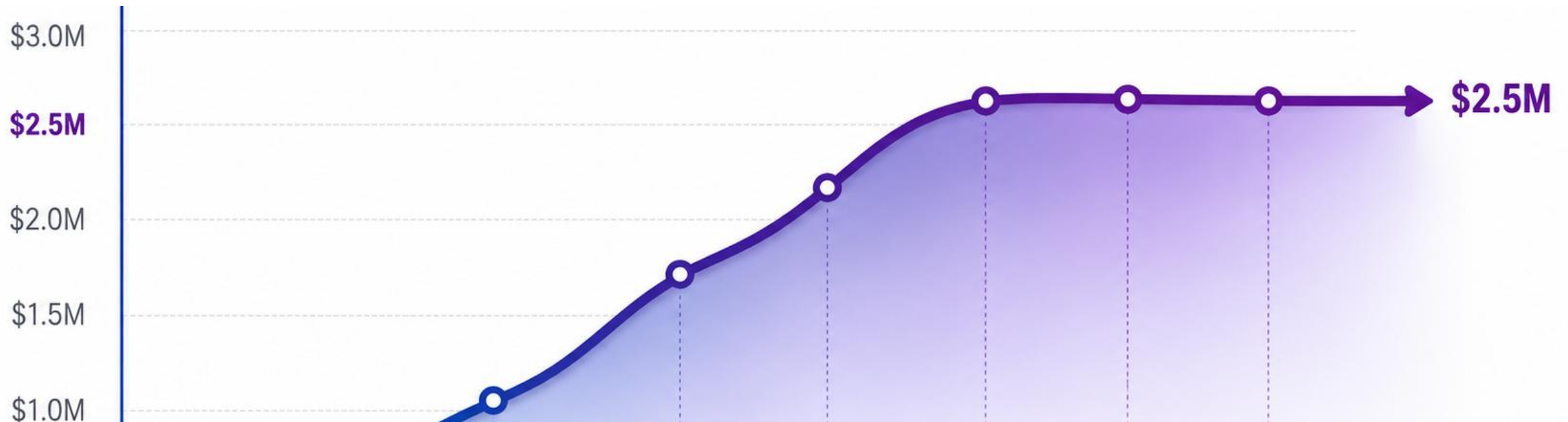
- Great referrals... but no room to take more clients
- Office staff constantly putting out fires
- Team members wearing five hats
- Owners solving everyone else's problems
- Good ideas never get implemented
- Everyone is busy...
 - No one has time to improve the business



Why Great Agencies Plateau

- Start-up
- Momentum
- Growth
- Busy
- Overwhelmed
- Plateau

Growth Curve





What Do I Do?

-  Hire More People?
-  What about VAs?
-  How about AI?



**"How much growth am I missing
because my best people are spending time on tasks
someone else could do?"**

Your Best Employees Are Probably Doing the Wrong Work

What They're Great At

- Building relationships
- Coaching caregivers
- Solving problems
- Recruiting talent
- Growing referrals



**Your \$60,000 Employee
is Doing
\$14.00-an-Hour Work**

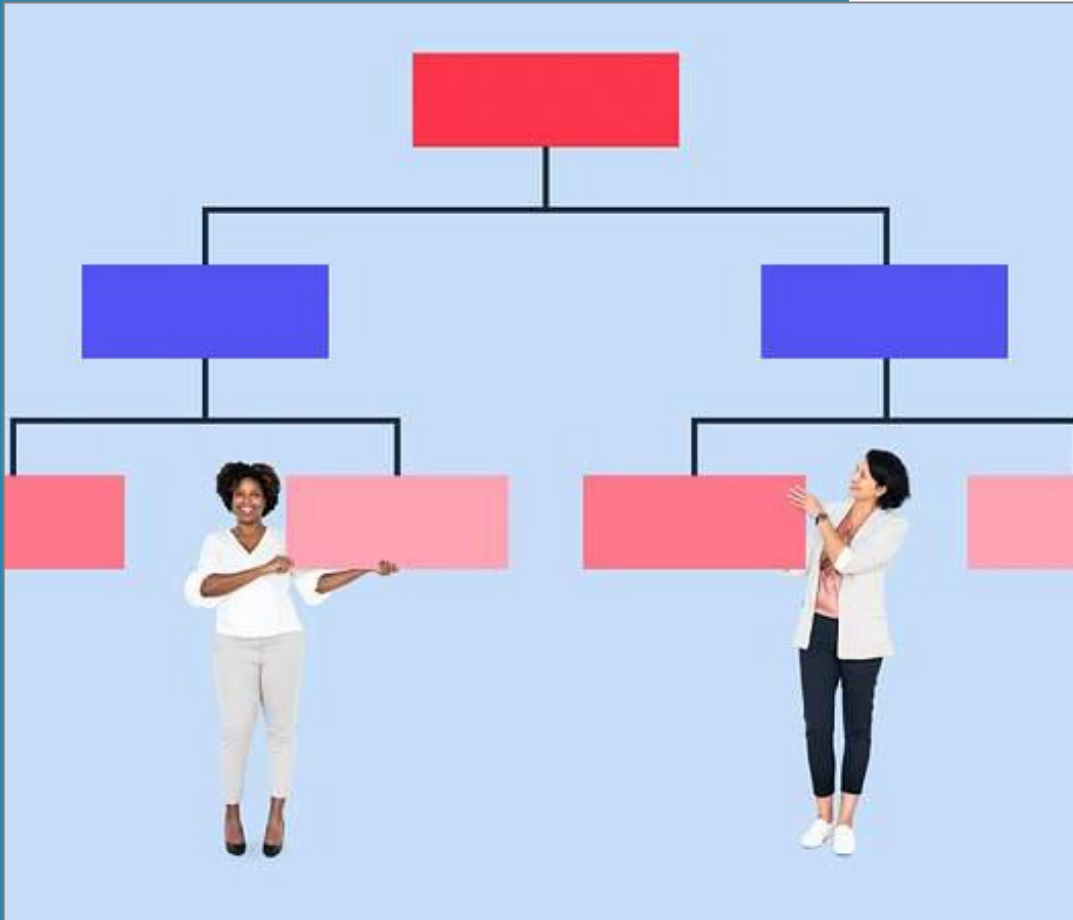
What They're Actually Doing

- Data entry
- Schedule updates
- Confirming shifts
- Chasing paperwork
- Answering routine calls

The Real Problem Isn't Just People... It's Infrastructure

Infrastructure a combination of:

- People
- Processes
- Systems / Technology
- Role clarity
- Accountability





**"How do I uncover hidden growth
inside my existing team?"**

Growth Infrastructure Blueprint TM

Why Teams Resist Change?

People don't resist support...they resist uncertainty.

Am I being replaced?

Is my job at risk?

Does management think I'm failing?

Will I lose the work I'm good at?

The Conversation That Changes Everything

Instead of saying...

“We’re bringing in help.”



Say...

"We're investing in you."

“Our goal is to help every member of this team spend more time doing what they do best.”



SUSTAINED GROWTH

.....⊙.....

**Infrastructure creates momentum
and long-term success.**

THE GROWTH INFRASTRUCTURE BLUEPRINT™

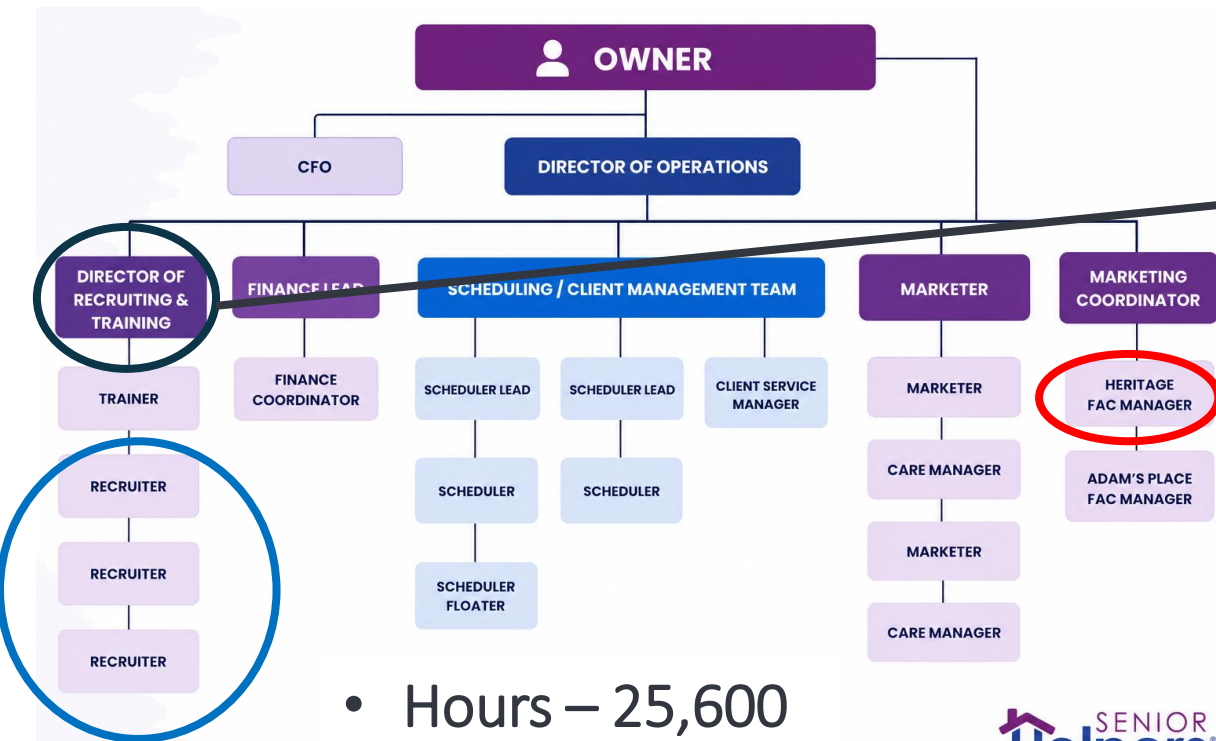
OPTIMIZE EDITION

A practical framework for uncovering hidden growth
inside your existing team.



Infrastructure Overhaul

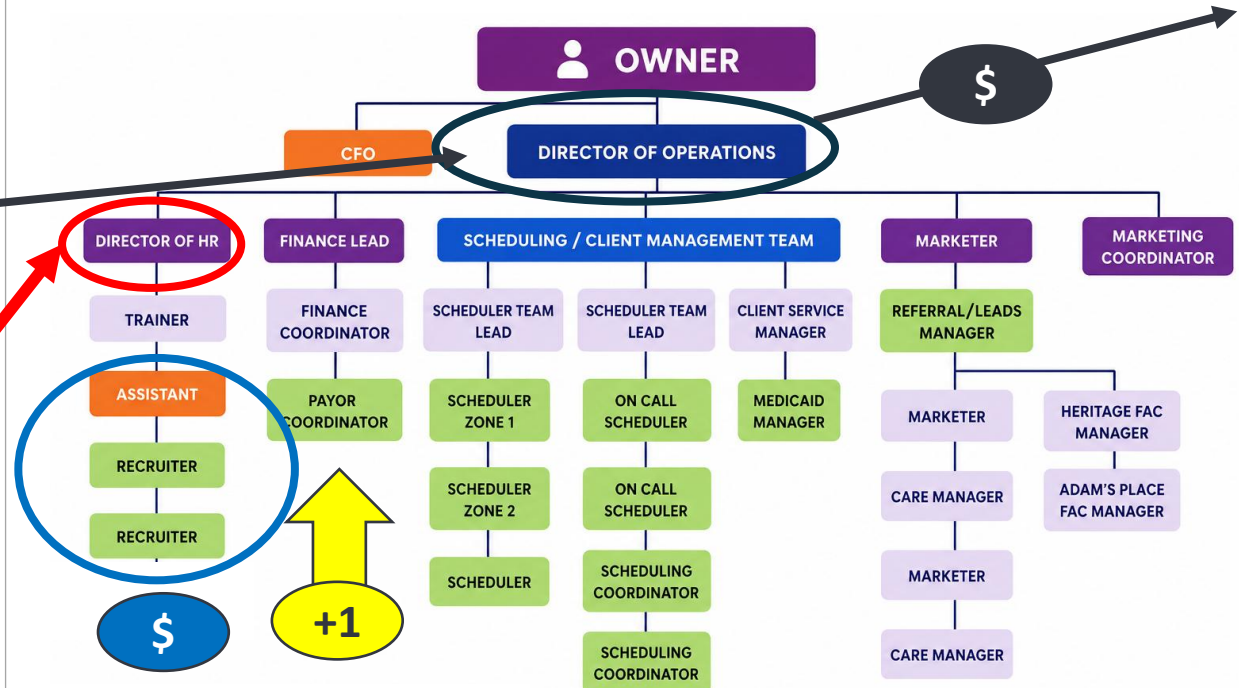
Pre Growth Infrastructure Blueprint



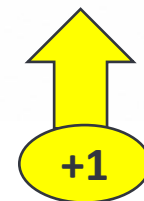
- Hours – 25,600
- **Net Profit – 8%**
- Admin Staff - 23



Post Growth Infrastructure Blueprint



- Hours – 35,200
- **Net Profit – 18%**
- Admin Staff - 29



Building the **Right** Infrastructure is Key

PEOPLE

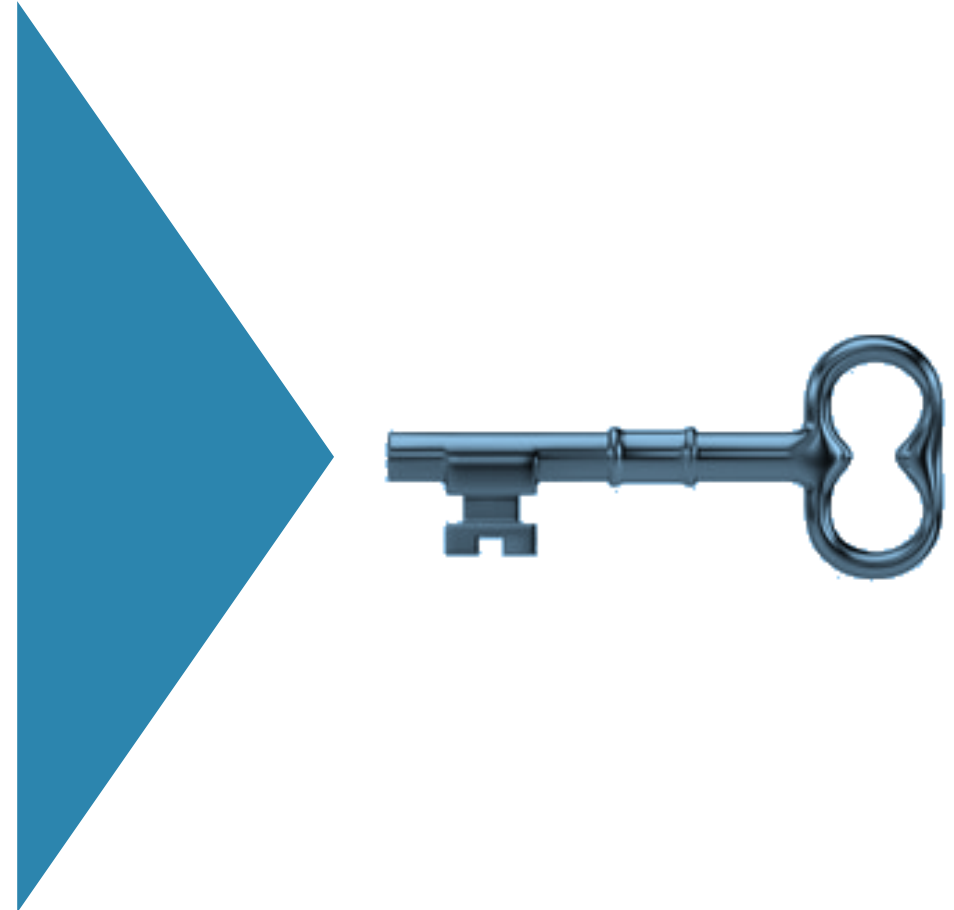
Do the work requiring judgment, relationships, leadership, creativity, empathy, and expertise.

VIRTUAL PROFESSIONALS

Provide dedicated human capacity for work that can be performed remotely and consistently.

AI / TECHNOLOGY / AUTOMATION

Handle appropriate repeatable, process-driven, data-oriented, and technology-enabled work.



What Success Looks Like:

- Defined manageable roles
- Consistent lead / referral flow
- Reliable caregiver recruitment
- Strong client experience
- Predictable weekly results
- Positive morale
- Sustainable steady growth





Success?

You have a
successful business...
and...



Optimize Your People. Streamline Your Systems. Accelerate Your Growth.



ALIGN ROLES AND RESPONSIBILITIES

*The right people
doing the right work.*



IMPROVE PROCESSES AND EFFICIENCY

*Less chaos.
More consistency.*



SCALE WITH A STRONGER INFRASTRUCTURE

*Free your best people
to do more of what matters.*



GROWTH INFRASTRUCTURE BLUEPRINT™

OPTIMIZE EDITION

Leadership Kit™

Everything You Need to Optimize Your Team, Processes, and Structure
to Remove Bottlenecks and Accelerate Profitable Growth

Streamline the work. Strengthen your team. Grow what's next.

THE NINE-STEP OPTIMIZE JOURNEY



*For growing home care agencies ready to optimize their team, processes, and
structure for the next stage of growth.*

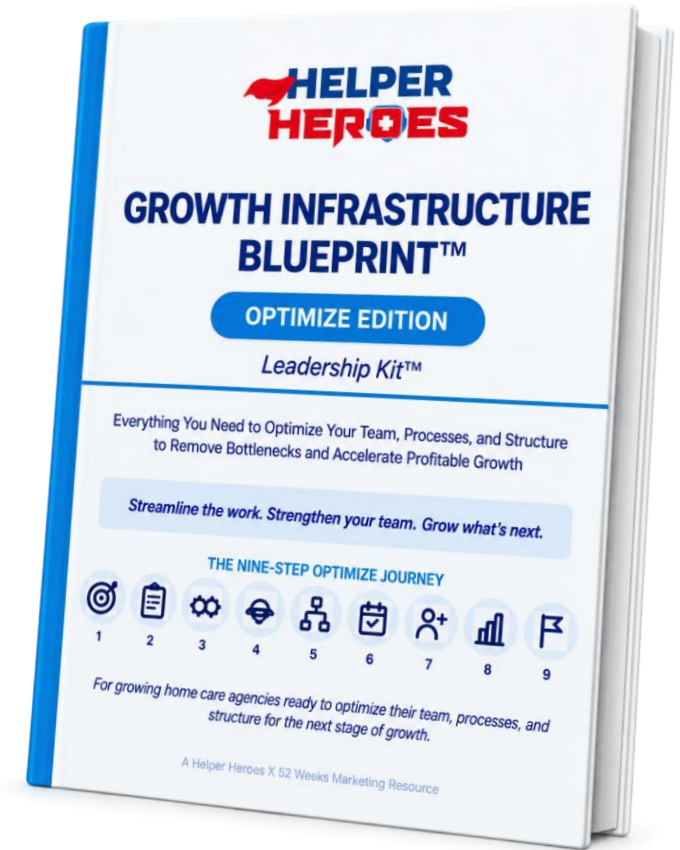
A Helper Heroes X 52 Weeks Marketing Resource

What You'll Need



Format of the Workbook

- ❖ The Why Behind Each Step
- ❖ Tips from Deb
- ❖ Leadership Discussion Points
- ❖ Team Exercise with Examples
- ❖ Worksheets – Actionable Outcomes



1

POSITION GROWTH AS AN OPPORTUNITY

Create Excitement Before You Create Change



Growth starts with trust.

People support what they help create.



Support creates opportunity, not replacement.

We're removing barriers so our team can do even greater work.



Paint a picture of where we're headed.

Inspire with a clear vision of our future.



Invite everyone to help build the future.

The best ideas—and the best outcomes—come together.

Pages:
5 - 8

**“ We’re not replacing great people.
We’re removing barriers so great people can do even greater work. ”**

2

BRING THE RIGHT PEOPLE TOGETHER

Every Process Has an Expert



Invite representatives from every critical area.



Everyone sees a different part of the picture.



The objective isn't to solve problems.



It's to understand how work really happens.



When the right people come together, you uncover the **gaps**, **patterns**, and **opportunities** you can't see on your own.

Pages:
9 - 12

3

IDENTIFY STRENGTHS BEFORE TASKS

Start With People...Not Job Descriptions.

WHAT THEY'RE GREAT AT



What do they do exceptionally well?



What energizes them?



Where do they create the most value?

VS.

WHAT THEY SPEND TIME DOING



What fills their calendar?



What tasks drain their time?



What could someone else do?



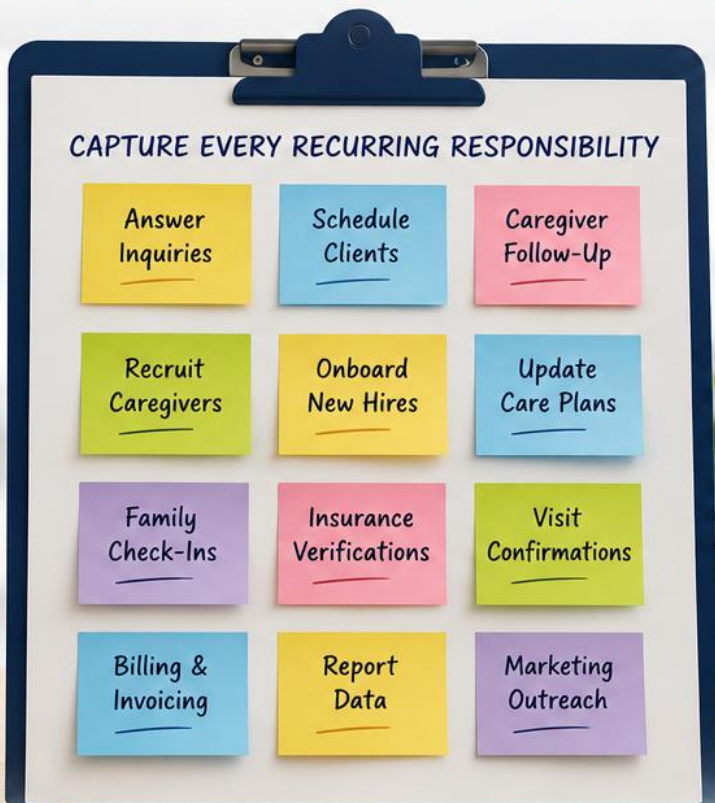
When you start with strengths, you unlock potential.
More strengths. More impact. More growth.

Pages:
13 - 16

4

CONDUCT A TASK INVENTORY

You Can't Improve What You Can't See.



CAPTURE EVERY RECURRING RESPONSIBILITY

Answer
Inquiries

Schedule
Clients

Caregiver
Follow-Up

Recruit
Caregivers

Onboard
New Hires

Update
Care Plans

Family
Check-Ins

Insurance
Verifications

Visit
Confirmations

Billing &
Invoicing

Report
Data

Marketing
Outreach



Document everything.

List every recurring task—big and small.



Include all types of work.

Administrative, operational, communication, reporting, follow-up, and more.



Be thorough and objective.

Don't filter or judge the work.
Just capture it as it is today.



Involve the people who do the work.

They know the details others may miss.



Create clarity before you create change.

You can't improve what you can't see.

**Pages:
17 - 21**



The more visible the work, the more powerful the opportunities.

Capture it all. See it clearly. Change it intentionally.

EXAMPLE

TASK INVENTORY INSTRUCTIONS



Write every recurring responsibility you perform.



Don't judge the task.



Don't decide whether it should stay or move.



Simply capture reality.



REMEMBER:
If you do it...write it down.

EXAMPLES OF TASKS BY DEPARTMENT



Scheduling (Yellow)
Schedule caregivers, manage changes, verify availability



Recruiting (Blue)
Post jobs, screen applicants, conduct interviews



Client Care (Green)
Client check-ins, care plans, family communication



Finance (Pink)
Payroll, invoicing, reconcile accounts



Marketing (Purple)
Social media, community outreach, referral follow-up

ORGANIZE THE STICKY NOTES IN THIS ORDER ON THE BOARD

DAILY RESPONSIBILITIES			WEEKLY RESPONSIBILITIES			MONTHLY RESPONSIBILITIES			UNEXPECTED RESPONSIBILITIES	
Check caregiver availability	Schedule caregiver visits	Answer phone calls	Review caregiver schedules	Team huddle meetings	Address scheduling issues	Create caregiver schedule	Review scheduling metrics	Run schedule reports	Cover open shifts	Handle caregiver emergencies
Confirm schedule changes	Handle last minute changes	Update caregiver notes	Verify visit hours	Update scheduling reports	Check caregiver feedback	Meet with caregivers			Fill in for staff when needed	Solve last minute problems
Review new applications	Screen applicants	Respond to job inquiries	Review applicants	Interview candidates	Update job postings	Analyze hiring results	Attend career fairs		Urgent hiring needs	Onboard new hires quickly
Schedule interviews	Check references	Update applicant status	Team recruiting meeting	Follow up with candidates	Update hiring pipeline	Update hiring process	Monthly recruiting report		Cover open positions	Update job postings urgently
Check in with clients	Review care notes	Follow up on client needs	Team case review	Review new admissions	Follow up on client issues	Care plan reviews	Client satisfaction reviews		Handle client crises	Address family concerns
Coordinate with families	Update care plans	Document client calls	Update client communications	Coordinate care changes	Review care quality	Monthly team meeting	Quality assurance review		Cover client visits	Respond to urgent requests
Process payments	Answer billing questions	Reconcile accounts	Run weekly payroll	Review A/R aging report	Pay bills	Close books	Prepare financial reports		Fix payroll issues	Handle billing disputes
Pay caregivers	Record expenses	Deposit checks	Update financial reports	Check budget	Review weekly expenses	Review budget vs actual	Monthly financial meeting		Address audit requests	Urgent financial requests
Respond to referral inquiries	Post on social media	Update website	Review marketing metrics	Plan weekly social posts	Update referral tracker	Monthly marketing report	Plan monthly marketing strategy		Respond to unexpected inquiries	Manage reputation issues
Community outreach	Send newsletters	Follow up on referrals	Check community events	Review website analytics	Team marketing meeting	Review ROI	Board marketing update		Jump on opportunities	Update communications urgently



Keep sticky notes within your department's color so we can see where work is concentrated.

5

IDENTIFY THE BOTTLENECKS

Find What's Slowing Growth.



Does this require your expertise?

Does it require specialized knowledge, leadership judgment, clinical expertise, or authority that belongs with the current role?

MUST STAY WITH CURRENT ROLE



Could this work be streamlined?

Could a better process, system, technology, automation, or AI make this work faster, simpler, or more consistent?

COULD STREAMLINE WITH PROCESS OR AUTOMATION



Does this work need to stay on your plate?

Could someone else perform this work effectively with the right process, training, and accountability?

OPPORTUNITY TO DELEGATE

Same Work. A Smarter Way.

Not everything needs your time. Identify what to keep, streamline or delegate so you can focus on what drives growth.



If it doesn't require your expertise, ask whether it can be streamlined or delegated.
Free up your time and your team's time for the work that truly drives growth.

**Pages:
22 - 26**

STEP 5: IDENTIFYING OUR BOTTLENECKS

Review the sticky notes from your **Task Inventory (Step 4)**.

For each responsibility, decide whether it **must stay** with the current role, could be streamlined with process or automation, or is an opportunity to delegate using dot sheets.

Same Work. A Smarter Way.

Not everything needs your time.

Identify what to keep, streamline or delegate so you can focus on what drives growth.

DAILY RESPONSIBILITIES			WEEKLY RESPONSIBILITIES			MONTHLY RESPONSIBILITIES			UNEXPECTED RESPONSIBILITIES	
Check caregiver availability ●	Schedule caregiver visits ●	Answer phone calls ●	Review caregiver schedules ●	Team huddle meetings ●	Address scheduling issues ●	Create caregiver schedule ●	Review scheduling metrics ●	Run schedule reports ●	Cover open shifts ●	Handle caregiver emergencies ●
Confirm schedule changes ●	Handle last minute changes ●	Update caregiver notes ●	Verify visit hours ●	Update scheduling reports ●	Check caregiver feedback ●		Meet with caregivers ●		Fill in for staff when needed ●	Solve last minute problems ●
Review new applications ●	Screen applicants ●	Respond to job inquiries ●	Review applicants ●	Interview candidates ●	Update job postings ●	Analyze hiring results ●	Attend career fairs ●		Urgent hiring needs ●	Onboard new hires quickly ●
Schedule interviews ●	Check references ●	Update applicant status ●	Team recruiting meeting ●	Follow up with candidates ●	Update hiring pipeline ●	Update hiring process ●	Monthly recruiting report ●		Cover open positions ●	Update job postings urgently ●
Check in with clients ●	Review care notes ●	Follow up on client needs ●	Team case review ●	Review new admissions ●	Follow up on client issues ●	Care plan reviews ●	Client satisfaction reviews ●		Handle client crises ●	Address family concerns ●
Coordinate with families ●	Update care plans ●	Document client calls ●	Update client communications ●	Coordinate care changes ●	Review care quality ●	Monthly team meeting ●	Quality assurance review ●		Cover client visits ●	Respond to urgent requests ●
Process payments ●	Answer billing questions ●	Reconcile accounts ●	Run weekly payroll ●	Review A/R aging report ●	Pay bills ●	Close books ●	Prepare financial reports ●		Fix payroll issues ●	Handle billing disputes ●
Pay caregivers ●	Record expenses ●	Deposit checks ●	Update financial reports ●	Check budget ●	Review weekly expenses ●	Review budget vs actual ●	Monthly financial meeting ●		Address audit requests ●	Urgent financial requests ●
Respond to referral inquiries ●	Post on social media ●	Update website ●	Review marketing metrics ●	Plan weekly social posts ●	Update referral tracker ●	Monthly marketing report ●	Plan monthly marketing strategy ●		Respond to unexpected inquiries ●	Manage reputation issues ●
Community outreach ●	Send newsletters ●	Follow up on referrals ●	Check community events ●	Review website analytics ●	Team marketing meeting ●	Review ROI ●	Board marketing update ●		Jump on opportunities ●	Update communications urgently ●



MUST STAY WITH CURRENT ROLE

Requires leadership judgment, clinical expertise, or strategic oversight.



COULD STREAMLINE WITH PROCESS OR AUTOMATION

Could be improved with a more efficient process and/or technology, systems, or AI.



OPPORTUNITY TO DELEGATE

Could eventually move to another team member, a virtual assistant, or a future position.



GOAL: Identify work that must stay with you, work that could be streamlined, and work that could be delegated or moved.



This creates capacity. Capacity creates growth.

Problems
 Complaints - not getting in system fast enough
 - Specifics of case - missing
 - Client Activation - Not activated in system

Auth's Process
 AC → Referral Bot - MD Tenn Choices - Auto Resp
 AG → Availability - Carrington
 BC → Email - Direct - MD Tenn Choices
 → Ricki
 Validate with Ricki - Specifics of case - Start date
 → Call her
 Ricki puts on scheduler radar

Action:
 Review Bot Restrictions - Ricki
 - Sept 14
 Mike Carrington - Sept 14

See attached Process Summary and notes below:

Problem Statements:

- Care plans not getting in the system fast enough
- Clients not activated in a timely manner - become quick starts
- Not getting the case specifics - need to get details of what's involved
- Getting cases that are rural and/or challenging clients - we need more time to staff appropriately

CHOICES Referral to Start Process:

Referrals:

AC - Referral Bot - Auto accepted for SH. Message is sent to MD TENN CHOICES, then call is made to SH to confirm referral rec'd

AG - Availability - Carrington receives referral and accepts

BC - Email or calls are sent directly to SH (MD TENN CHOICES)

- When BlueCare send referrals - we are often missing important information - We must now collect the following using the Intake Form (to be developed)
- Important specifics of case to collect: Units, DME, Skills needed, pets, location, family caregiver, why the change, bed bugs, family involved, etc. (see form)

Next steps from Referral:

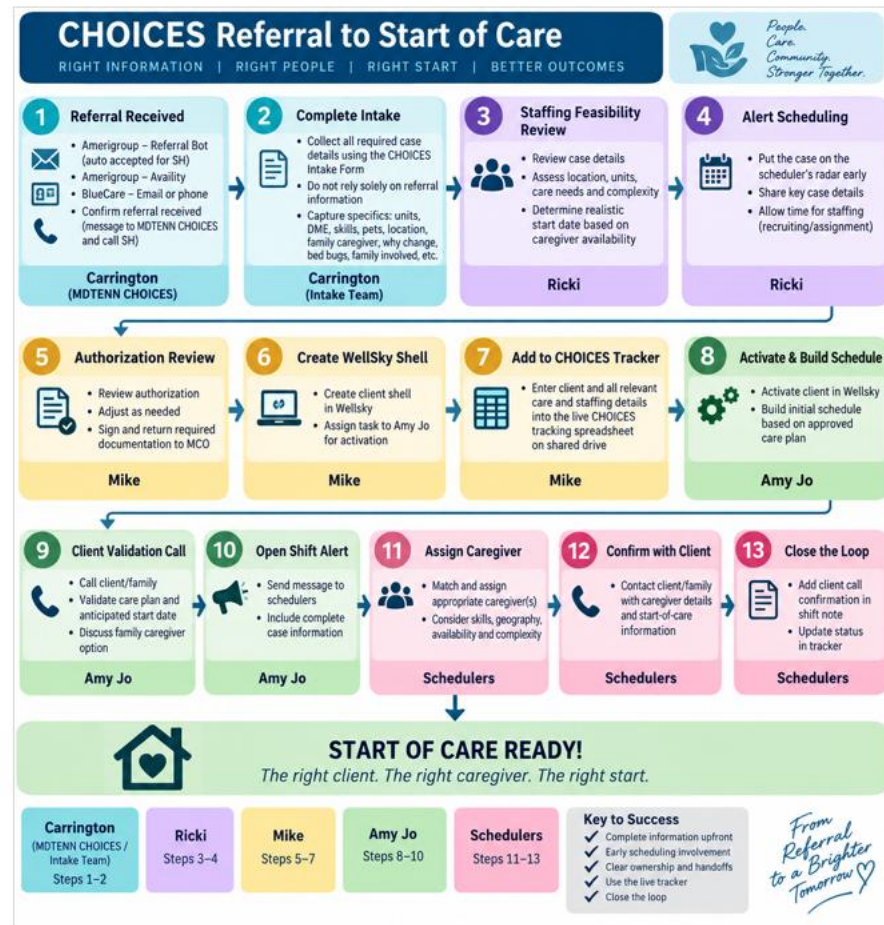
1. Call Ricki and share details of case - important specifics collected from care coordinators
2. Ricki sets start date for case based on CO availability and clients specifics
3. Ricki puts case on scheduler's radar
4. Mike will adjust authorization as needed and sign and return to MCO
5. Mike creates shell in WellSky and assigns task for Amy Jo to activate client
6. Mike adds client and care specifics to the live spreadsheet on shared drive
7. Amy Jo activates client and builds the schedule in WellSky
8. Amy Jo calls the client to validate the care plan and start date and asks about family caregiver option
9. Amy Jo send message to schedulers - open shift alert
10. Schedulers assign caregivers and contact client with details, caregiver
11. Schedulers close the loop by adding client call confirmation in shift note.

Additions to Weekly Workflow:

1. Kirk and Carrington will review live spreadsheet and take necessary action on clients who have bottlenecked in process

Immediate Action Plan

Action	Owner	Due
2. Review Referral Bot restrictions and remove ZIP codes/service areas SH does not cover	Carrington	Sept. 14
3. Send email/phone communication to BlueCare care coordinators regarding department/process changes; send to MD TENN	Mike / Carrington	Sept. 14
4. Develop standardized CHOICES Intake Form	Ricki	Sept. 14
5. Train Mike/Kam on care plans in WellSky	Kirk / Kam	Sept. 15
6. Build live CHOICES Referral-to-Start tracking spreadsheet	Carrington	Sept. 14



6

BUILD THE OPPORTUNITY BOARD

Turn Bottlenecks Into Possibilities.



Make the invisible, visible.

Seeing the work on paper reveals where support can create capacity.



Not about titles—about tasks.

Focus on the work that's keeping your leaders from leading.



Every sticky note is future capacity.

Every task moved is time returned to your team.



More capacity = more growth.

Free up time for relationships, strategy, and high-impact work.



This is where opportunity becomes real.

From bottlenecks to breakthroughs.

Pages:
27 - 31



Every delegated task becomes future growth capacity.

This board shows you what's possible.



 SCHEDULING	 RECRUITING	 CAREGIVER SUPPORT	 CLIENT CARE	 INTAKE & SALES	 FINANCE	 HR	 MARKETING	 OPERATIONS	 EXECUTIVE SUPPORT
SCHEDULE MANAGEMENT Update schedule (changes) Handle last minute changes Send schedule updates CAREGIVER COMMUNICATION Check caregiver availability Answer phone calls SHIFT MANAGEMENT Confirm schedule changes Enter time off requests Confirm shift coverage	APPLICANT MANAGEMENT Screen applicants Post jobs on job boards Update applicant status Schedule interviews New hire reminders Check references OUTREACH & FOLLOW-UP Respond to job inquiries Send follow-up emails	CAREGIVER RECORDS Update caregiver records Manage caregiver file updates Order caregiver ID badges COMMUNICATION & ENGAGEMENT Answer caregiver phone calls Route calls to care managers Track training compliance Caregiver appreciation outreach Send caregiver text alerts	CLIENT COMMUNICATION Enter visit notes Care plan reminders Client check-ins Follow up on client needs Document client calls CARE PLAN MANAGEMENT Update care plans Care plan reviews Client satisfaction surveys File document updates	LEAD MANAGEMENT Enter inquiry calls Schedule assessments Enter leads in CRM Update lead status Prepare welcome packets Send follow-up information Data entry for referrals Track referral sources	PAYROLL & TIMEKEEPING Return timesheets Approve payroll Process payroll runs Update docs to payors BILLING & ACCOUNTS Process payments Answer billing questions Reconcile accounts Record expenses Deposit checks REPORTING Update financial reports Check budget Review weekly expenses	EMPLOYEE MANAGEMENT New hire onboarding checklists Update employee files TRAINING & DEVELOPMENT Schedule orientation Track training records Send policy reminders ENGAGEMENT & COMPLIANCE Employee relations Benefits questions (admin)	CONTENT & SOCIAL MEDIA Social media posting Create content Newsletter assembly Update website content Track campaign results Community partnership meetings Review marketing metrics Plan weekly social posts Review website analytics	PROCESS & SYSTEMS Process improvement Prepare meeting agendas Document processes Update procedure manuals Coordinate vendor services Create standard reports MEETINGS & REPORTING Team meetings Client satisfaction reviews Quality assurance review Board marketing update	ADMINISTRATIVE SUPPORT Calendar management Travel arrangements Prepare presentations Compile reports Manage inbox Track action items Research projects Event logistics Update communications urgently

7

DESIGN ROLES AROUND THE WORK

Build the Work First. Create the Position Second.

THE WORK

Unorganized. Overloaded. Scattered.



THE ROLE

Organized. Purposeful. Impactful.

SCHEDULING & CLIENT SUPPORT SPECIALIST



- ✓ Schedule Coordination
- ✓ Inbox & Communication Management
- ✓ Follow-Up Calls & Reminders
- ✓ Caregiver Onboarding Support
- ✓ Data Entry & Updates
- ✓ Reporting Support



Start with the work.

Identify and group tasks that belong together.



Match skills to the work.

Design roles that play to strengths and create the most value.



Create clarity and focus.

A well-designed role eliminates confusion and duplication.



Build for scalability.

Thoughtful roles create a foundation for sustainable growth.



Work first. Titles second.

The right role titles emerge naturally from the work.



When you design roles around the work,
you create alignment, efficiency, and capacity for growth.
The right work. In the right role. For the right impact.



Pages:
32 - 35

EXAMPLE

STEP 7: DESIGNING FUTURE ROLES

Turn Opportunities into a Stronger Team.

Same Work. A Smarter Way.

Right work. Right role. More capacity. More growth.

Based on the opportunities identified in Step 6, group similar tasks into future roles, team members, or automation solutions that will support your growth.

 SCHEDULING	 RECRUITING	 CAREGIVER SUPPORT	 CLIENT CARE	 INTAKE & SALES	 FINANCE	 HR	 MARKETING	 OPERATIONS	 EXECUTIVE SUPPORT
FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)
Scheduling Coordinator	Recruiting Coordinator	Caregiver Support Coordinator	Client Care Coordinator	Lead & Referral Coordinator	Billing & Accounts Coordinator	HR Coordinator	Marketing Coordinator	Operations Coordinator	Executive Assistant
KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES
- Check caregiver availability - Update schedules - Handle last minute changes - Send schedule updates - Confirm shift coverage - Enter time off requests	- Screen applicants - Post jobs on job boards - Update applicant status - Schedule interviews - Send follow-up emails - Check references - Respond to job inquiries	- Update caregiver records - Manage caregiver file updates - Order caregiver ID badges - Answer caregiver phone calls - Route calls to care managers - Track training compliance - Send caregiver text alerts	- Enter visit notes - Care plan reminders - Client check-ins - Follow up on client needs - Document client calls - Update care plans - Care plan reviews - Client satisfaction surveys - File document updates	- Enter inquiry calls - Schedule assessments - Enter leads in CRM - Update lead status - Prepare welcome packets - Send follow-up information - Data entry for referrals - Track referral sources	- Process payroll runs - Process payments - Answer billing questions - Reconcile accounts - Record expenses - Deposit checks - Update financial reports - Check budget - Review weekly expenses	- New hire onboarding checklists - Update employee files Training & Compliance Coordinator - Schedule orientation - Track training records - Send policy reminders - Benefits questions (admin) - Employee relations support	- Social media posting - Create content - Newsletter assembly - Update website content - Track campaign results - Community partnership meetings - Review marketing metrics - Plan weekly social posts - Review website analytics	- Process improvement - Prepare meeting agendas - Document processes - Update procedure manuals - Coordinate vendor services - Create standard reports - Team meetings - Client satisfaction reviews - Quality assurance review - Board marketing update	- Calendar management - Travel arrangements - Prepare presentations - Compile reports - Manage inbox - Track action items - Research projects - Event logistics - Update communications urgently
IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT
Frees up leadership time, improves response time and coverage.	Builds a consistent pipeline and speeds up time to hire.	Improves caregiver experience and reduces administrative burden.	Enhances communication and client satisfaction, keeping clients engaged and safe.	Faster follow-up, more conversions, stronger referral relationships.	Improves accuracy, speeds up processes and keeps financials on track.	Keeps team members supported, compliant and engaged.	Keeps your brand visible, consistent and top of mind in the community.	Drives consistency, accountability and efficiency across the agency.	Frees up leadership time to focus on strategy, relationships and growth.



The right roles create capacity. Capacity creates growth.



From bottlenecks to a stronger, more scalable team.

8

SHOW EVERYONE WHAT'S IN IT FOR THEM

People Support What They Help Create.

TODAY

Overwhelmed. Reactive. Stretched Thin.



TOMORROW

Focused. Proactive. Impactful.



Ask Every Leader:

"If these tasks disappeared tomorrow, what could you accomplish?"



More time with clients and families.

Deeper relationships create stronger loyalty.



Better recruiting and retention.

You have time to build your culture.



Stronger marketing and community impact.

Consistent outreach drive more referrals.



More leadership and innovation.

You focus on what only you can do.

Pages:
36 - 39



When your people see the future they help create,
they become champions of the change.



9

BUILD YOUR GROWTH ROADMAP

From insight to action. From today to your next level.

Turn your plan into a clear, prioritized roadmap that drives results.



PRIORITIZE

Focus on the opportunities that will create the biggest impact.



SEQUENCE

Order the actions for maximum impact and feasible execution.



ASSIGN OWNERSHIP

Clarify who is accountable for what and by when.



MEASURE PROGRESS

Track leading indicators and celebrate wins along the way.



BUILD MOMENTUM

Keep the wins coming and continuously elevate your organization.

YOUR GROWTH ROADMAP

 30 DAYS	 90 DAYS	 6-12 MONTHS
 Quick Wins Address immediate opportunities	 Role Redesign Realign people to highest-value work	 Scale What Works Expand proven strategies
 Process Improvements Eliminate friction and save time	 Systems & Tools Strengthen systems and technology	 Strengthen Leadership Develop leaders at every level
 Roles & Responsibilities Clarify key priorities and ownership	 Team Development Build skills and capacity	 Sustainable Growth Create systems that drive consistent results
 Early Metrics Establish baseline and track early results	 Measure & Adjust Review results and refine the plan	 Achieve Next Level Reach your next stage of growth



A clear plan. Focused actions. Measurable results.
YOUR ROADMAP TO UNLOCK HIDDEN GROWTH.



Pages:
40 - 43

The Ripple Effect

Instead of...

- Constant firefighting
- Burnout
- Bottlenecks
- Slow decisions
- Reactive leadership
- Poor morale

You get...

- Stronger client experience
- Better caregiver retention
- Faster recruiting
- More consistent marketing
- Leaders who have time to lead
- Happier staff



There Isn't One Solution...

Agencies create infrastructure breakthroughs through :

- Clearer role design
- Better workflows
- Technology / Automation
- Internal promotions
- Additional support staff
 - **Virtual support teams**





Helping Agencies Build Infrastructure



Recruiter



Scheduler



**On-Call
Scheduler**



**Intake & Lead
Management**



**Finance/
Billing**



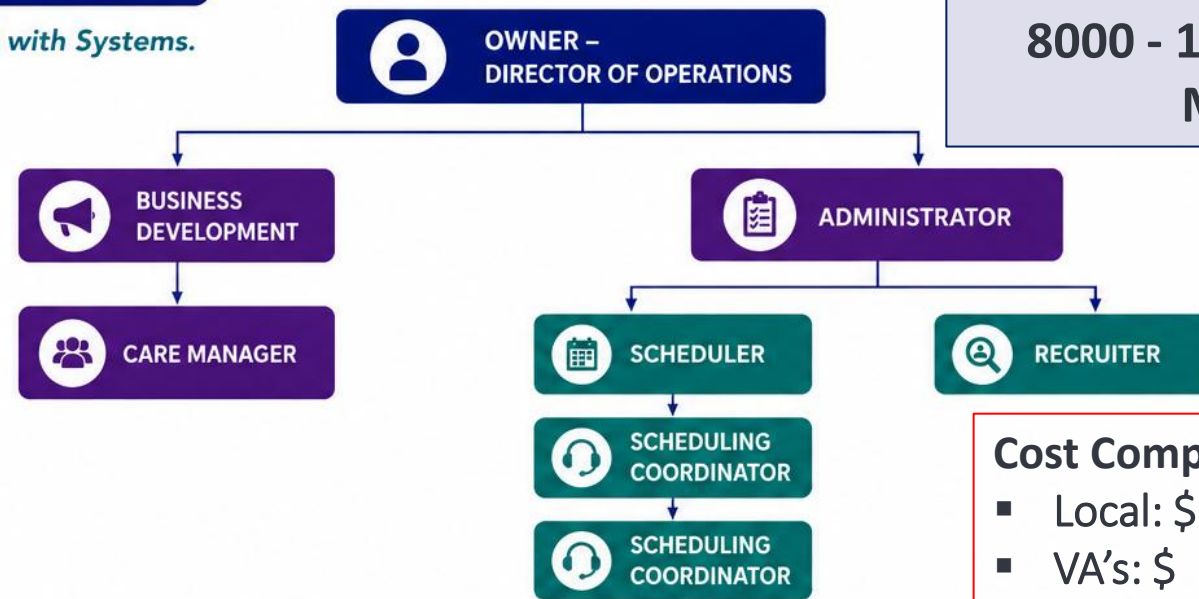
**Admin
Assistant**

41

Free Your Best People To Do The Work Only They Can Do

100 – 200 CLIENTS

Scale with Structure. Lead with Systems.



8000 - 16000 Hours / Month

Cost Comparison:

- Local: \$15,780 / M
- VA's: \$ 8,640 / M

ROLE DEFINITIONS



OWNER – DIRECTOR OF OPERATIONS

- Oversees operation
- Manages leaders

Provides overall leadership, sets strategy, oversees daily operations, and manages key leaders.



BUSINESS DEVELOPMENT

- Marketing
- Assessments

Leads business development, drives marketing efforts, and conducts client assessments.



CARE MANAGER

- Assessments
- Care plans
- Quality care oversight / collaboration with Schedulers
- Backup for referrals / leads intake

Ensures client needs are met through care planning, quality oversight, and collaboration with the scheduling team.



ADMINISTRATOR

- Team Lead
- Billing
- Payroll
- HR documentation
- Trainer – Orientation
- Referral and Lead Management
- On Call

Manages day-to-day operations, administration, and team support functions.



SCHEDULER

- Scheduling
- Care Oversight
- Caregiver Utilization
- Confirming shifts
- On Call

Manages scheduling, care oversight, caregiver utilization, confirms shifts, and provides after-hours support.



SCHEDULING COORDINATOR

- Confirm shifts
- Manage call-outs during busy times
- On Call rotation

Supports scheduler by confirming shifts and managing call-outs.



RECRUITER

- Job ads
- Screening
- Interviewing
- Onboarding documentation

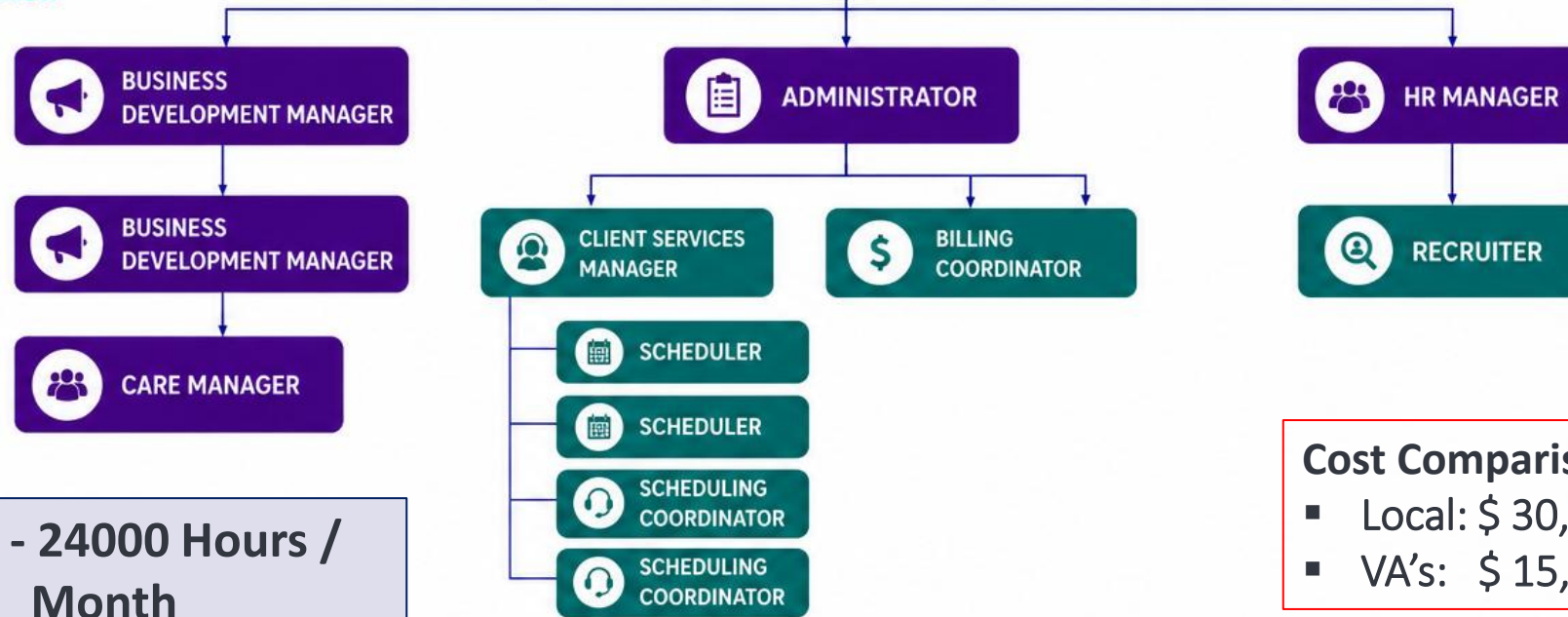
Handles the full recruiting process from posting jobs to onboarding new caregivers.



FOCUS: Strengthen systems and leadership while leveraging virtual support to drive growth and quality care.

200 – 300 CLIENTS

Scale Systems. Drive Excellence.
Expand Impact.



16000 - 24000 Hours /
Month

Cost Comparison:

- Local: \$ 30,400 / M
- VA's: \$ 15,120 / M

ROLE DEFINITIONS

OWNER – DIRECTOR OF OPERATIONS	BUSINESS DEVELOPMENT MANAGER	CARE MANAGER	ADMINISTRATOR	CLIENT SERVICES MANAGER	SCHEDULER	SCHEDULING COORDINATOR	HR MANAGER	RECRUITER
- Oversees operation - Manages leaders	- Marketing - Assessments	- Assessments - Care plans - Quality care oversight / collaboration with Schedulers - Backup for referrals / leads intake	- Team Lead - Billing - Payroll - HR documentation - Trainer – Orientation - Referral and Lead Management - On Call	- Client communication - Satisfaction management - Service quality oversight - Issue resolution - Process improvement	- Scheduling - Care Oversight - Caregiver Utilization - Confirming shifts - On Call	- Confirm shifts - Manage call-outs during busy times - On Call rotation	- Recruiting support - Onboarding - Employee records - Compliance - HR support	- Job ads - Screening - Interviewing - Onboarding documentation
Provides overall leadership, sets strategy, oversees daily operations, and manages key leaders.	Leads business development, drives marketing efforts, and conducts client assessments.	Ensures client needs are met through care planning, quality oversight, and collaboration with the scheduling team.	Manages day-to-day operations, administration, and team support functions.	Oversees client experience, satisfaction, communication, and service quality.	Manages scheduling, care oversight, caregiver utilization, confirms shifts, and provides after-hours support.	Supports scheduler by confirming shifts and managing call-outs.	Manages HR functions, employee records, compliance, and onboarding for caregivers.	Handles the full recruiting process from posting jobs to onboarding new caregivers.

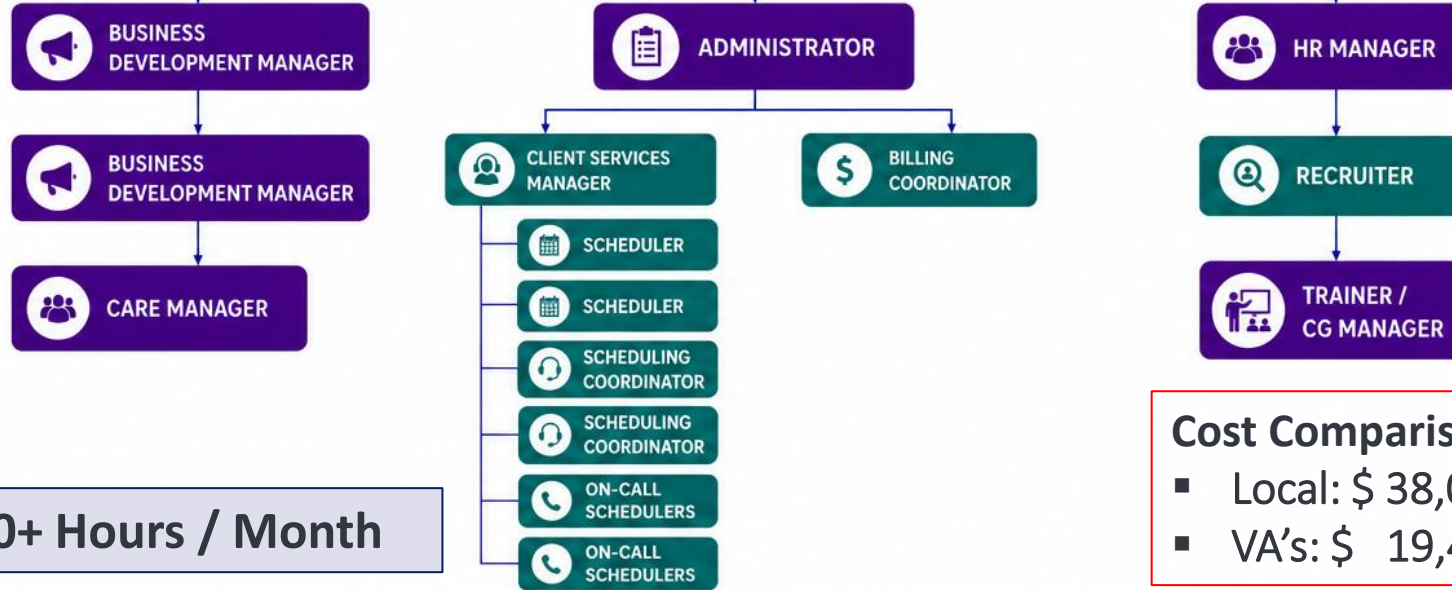


FOCUS: Scale systems, strengthen leadership, and leverage virtual support to drive growth and exceptional client experiences.

300+ CLIENTS

Scale Systems. Drive Excellence.
Expand Impact.

24000+ Hours / Month



Cost Comparison:

- Local: \$ 38,000 / M
- VA's: \$ 19,440 / M

ROLE DEFINITIONS



OWNER – DIRECTOR OF OPERATIONS

- Oversees operation
- Manages leaders

Provides overall leadership, sets strategy, oversees daily operations, and manages key leaders.



BUSINESS DEVELOPMENT MANAGER

- Marketing
- Assessments

Leads business development, drives marketing efforts, and conducts client assessments.



CARE MANAGER

- Assessments
- Care plans
- Quality care oversight / collaboration with Schedulers
- Backup for referrals / leads intake

Ensures client needs are met through care planning, quality oversight, and collaboration with the scheduling team.



ADMINISTRATOR

- Team Lead
- Billing
- Payroll
- HR documentation
- Trainer – Orientation
- Referral and Lead Management
- On Call

Manages day-to-day operations, administration, and team support functions.



CLIENT SERVICES MANAGER

- Client communication
- Satisfaction management
- Service quality oversight
- Issue resolution
- Process improvement

Oversees client experience, satisfaction, communication, and service quality.



SCHEDULER

- Scheduling
- Care Oversight
- Caregiver Utilization
- Confirming shifts
- On Call

Manages scheduling, care oversight, caregiver utilization, confirms shifts, and provides after-hours support.



SCHEDULING COORDINATOR

- Confirm shifts
- Manage call-outs during busy times
- On Call rotation

Supports scheduler by confirming shifts and managing call-outs.



HR MANAGER

- Recruiting support
- Onboarding
- Employee records
- Compliance
- HR support

Manages HR functions, employee records, compliance, and onboarding for caregivers.



RECRUITER

- Job ads
- Screening
- Interviewing
- Onboarding
- documentation

Handles the full recruiting process from posting jobs to onboarding new caregivers.



TRAINER / CG MANAGER

- Orientation & training
- Caregiver development
- Competency management
- Quality assurance

Trains and develops caregivers and ensures ongoing competency and quality standards.



FOCUS: Scale systems, strengthen leadership, and leverage virtual support to drive growth and exceptional client experiences.



The Helper Heroes Implementation Process

Simple steps. Powerful support. More time for what only you can do.



WE HANDLE THE SUPPORT. YOU LEAD WITH IMPACT.



52weeks
marketing



MARKETING *Drives* GROWTH.

INFRASTRUCTURE MAKES IT LAST.

A STRONGER, MORE PROFITABLE
HOME CARE AGENCY. **TOGETHER.**



52 WEEKS MARKETING

- ✓ Attract Referrals
- ✓ Build Your Pipeline
- ✓ Increase Conversions

*Strategy
that Delivers.*



HELPER HEROES

- ✓ Virtual Support
- ✓ Build Capacity
- ✓ Increase Profitability

*Support
that Scales.*



LET'S BUILD
WHAT'S NEXT.



SCHEDULE A
DISCOVERY CALL

EXPLORE. PLAN. GROW.

PEOPLE | PROCESS | GROWTH | TOGETHER



Schedule an Infrastructure Review



SCAN HERE



www.Helperheroes.com

FREE WORKBOOK FOR HOME CARE OWNERS

The Growth Infrastructure Blueprint™

Three editions, one for each revenue stage. Pick yours, work its nine steps with your office team, and finish with a written 90-day plan for what to fix, hand off, and measure first.

BUILD Edition



Optimize Edition



Coming
Soon
Sept 25

Workbook & How To Conduct a Blueprint Meeting - Recording