

BEYOND THE LICENSE

How to Attract Clients,
Build Referral Partnerships,
and Grow a Non-Medical
Home Care Agency



FIND
CLIENTS



BUILD
REFERRAL
PARTNERSHIPS



CREATE
COMMUNITY
PARTNERSHIPS



GROW
YOUR
AGENCY

OBIANUJU OBIEZE

DEMONDEK ENTERPRISES



BEYOND THE LICENSE



*How to Attract Clients, Build Referral Partnerships,
and Grow a Non-Medical Home Care Agency*

OBIANUJU OBIEZE

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The scenarios in this book are illustrative composites. Names, characters, and situations are fictional, and any resemblance to actual persons or organizations is coincidental. The sample scripts and letters are starting points to be adapted to each reader's agency, state rules, and circumstances.

Nothing in this book guarantees clients, referrals, contracts, revenue, program enrollment, or any particular business result.

First Edition, 2026

Dedication

To every home care agency owner who worked tirelessly to earn a license, only to discover that the license did not make the telephone ring.

To the families behind every referral—the daughter trying to keep her mother safe at home, the husband exhausted from caring for his wife alone, the parent of an adult with a developmental disability who has not rested in months.

And to the caregivers who show up for them every day.

This book is for you.

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INTRODUCTION

A License Is Permission, Not a Promise



There is a moment that almost every new home care agency owner remembers. After months of applications, policy manuals, background checks, inspections, corrections, training, and expense, the license finally arrives. You celebrate, and you should. Earning a license to care for people in their own homes is a genuine accomplishment, and it reflects a level of commitment that most people never attempt.

Then Monday morning comes. The office is furnished. The policies are in their binders. The business cards are printed, the website is live, and the caregivers you interviewed are waiting to hear when they can start. You sit down at your desk, ready to begin.

And the phone does not ring.

Tuesday passes the same way. You post an announcement on social media—Now accepting new clients!—and a few friends leave encouraging comments, but no one calls. You print flyers and visit a few facilities. At each one, a polite receptionist accepts your brochure and promises to pass it along to the social worker. You leave feeling productive. A week goes by, then another, and nothing happens. Eventually a quiet, uncomfortable question settles in: Where, exactly, am I supposed to find clients?

That question is the reason this book exists.

The Problem Is Not That Nobody Needs Home Care

Somewhere in your service area, right now, a family is struggling. A mother has become unsteady in the shower. A father has stopped cooking regular meals. A patient is being discharged from a rehabilitation center this week and cannot safely manage alone. A daughter is missing work because she has quietly become her parent's full-time caregiver. A spouse is exhausted. A family caring for an adult with an intellectual or developmental disability has not had a day of rest in months.

The need is real, and it is growing. The problem is that need and visibility are two different things. A family cannot call an agency it has never heard of. A discharge planner cannot recommend a provider she does not know exists. A community manager cannot invite an agency to speak if no one from that agency has ever introduced itself in a professional, trustworthy way. And a case manager cannot develop confidence in a provider who appeared once, left a brochure, and was never seen again.

Client acquisition, in other words, is not primarily an advertising problem. It is a problem of positioning, relationships, trust, education, follow-up, and consistency. Those are skills that can be learned, and this book will teach them to you.

Why the Usual Approach Fails

Many new owners approach every organization with some version of the same message: "Hello, I own a home care agency. Do you have anyone who needs services?" Consider that conversation from the other person's point of view. You have never met. They know nothing about your company, your reliability, how quickly you respond, whether you have caregivers available, or whether you will answer the phone when a worried family calls on a Friday evening. And the very first thing you have asked of them is to hand over someone in their care.

That is not relationship building. It is a request for trust that has not yet been earned.

Throughout this book, you will learn a different approach. Instead of entering a room asking, “What can you give my agency?” you will learn to ask, “What value can my agency bring to the people in this room?” That single shift changes how professionals respond to you, how communities receive you, and how families come to trust you.

A Tale of Two Agency Owners

Imagine two owners approaching the same independent living community on the same afternoon.

The first walks into the lobby carrying a stack of brochures and asks to speak with the manager. When the manager comes out, she explains that her agency provides personal care, companionship, transportation, and respite, and asks whether any residents might need services. The manager thanks her and suggests she leave a few brochures at the front desk. She leaves feeling that she has accomplished something. In truth, nothing meaningful has happened.

The second owner begins before she ever arrives. She learns that the community serves older adults who live independently and value that independence deeply. She calls the manager in advance, introduces herself, and offers something useful: a complimentary educational session for residents on staying safe, confident, and independent at home, and on recognizing when a little extra support might help. She makes clear that she has no intention of interfering with anything the community already provides; she simply wants to be a resource.

The manager agrees to a short meeting, mentions that residents enjoy monthly educational events, and schedules the presentation. On the day of the talk, the owner teaches. She speaks about home safety, about asking for help before a crisis occurs, and about protecting independence. Only at the very end does she briefly explain what her agency does and offer to stay for questions. Afterward, several residents

approach her. One of them says, “My daughter keeps telling me I should have someone come twice a week.”

That conversation may become an inquiry. The manager may invite her back. Residents may take her information home to their families. The second owner did not ask for anything, and yet she left with the beginning of a relationship. That is the difference between marketing and positioning, and it is the approach you will learn in every part of this book.

What You Will Learn

This book is organized in the same order you will build your client-acquisition system. Part I lays the foundation: understanding exactly whom your agency serves, what you are really offering families, how to position your agency, how to market ethically and legally, and how to prepare your outreach tools and referral database. Parts II through V take you into the field, one audience at a time—hospital and rehabilitation professionals, home health and hospice partners, senior living communities, faith communities, community organizations, and specialized groups such as disability, chronic illness, veteran, and family caregiver organizations.

Part VI shows you how to use education as your most powerful marketing tool and gives you six complete community presentations. Part VII explains how client acquisition differs by payment source, from private pay and long-term care insurance to Medicaid and managed care. Parts VIII and IX cover digital visibility and the option of facility staffing as a second revenue stream. Part X teaches you how to turn interest into admissions: handling the first call, discussing price, responding to objections, and keeping referral partners for the long term. Finally, Parts XI and XII give you a complete library of scripts, letters, and trackers, along with a week-by-week and ninety-day plan to put everything into practice.

Who This Book Is For

This book is written for owners, administrators, and marketing staff of non-medical home care agencies—whether you are preparing to open, newly licensed, or established but frustrated by inconsistent referrals. It is equally useful to the owner who does all of the marketing personally and to the agency that is ready to hire its first community liaison. No prior sales or marketing experience is required. What is required is a willingness to show up consistently, to lead with value, and to follow through.

A Word About the Families Behind Every Referral

Before we begin, it is worth remembering what this work is ultimately about. In marketing language, families become “leads,” and referrals become “opportunities.” But every one of those words represents a real person at a vulnerable moment—an older adult afraid of losing independence, a family preparing for a hospital discharge, a caregiver who is running out of strength. The strategies in this book are designed to help good agencies become visible to those families, and to earn their trust honestly. Nothing in these pages asks you to pressure, mislead, or take advantage of anyone. The most successful agencies are not the ones that sell the hardest; they are the ones that families and professionals trust the most.

A license gives you permission to operate. What you do next determines whether families ever find you. Let’s begin.

HOW TO USE THIS BOOK



This is not a book to read once and place on a shelf. It is designed to be used—chapter by chapter, week by week—as you build a steady flow of clients and referral partners. The following suggestions will help you get the most from it.

Start With Part I

It can be tempting to skip ahead to the chapters on hospitals or senior living communities, where referrals seem to live. Resist that temptation. The foundation you build in Part I—knowing whom you serve, what you offer, how you position your agency, and how you track your relationships—determines whether the outreach strategies in later chapters succeed. An owner who walks into a discharge planner's office with a clear message, the right materials, and a reliable follow-up system will outperform an owner who simply visits more offices.

How Each Chapter Is Organized

Every chapter follows a consistent structure so that you always know where to find what you need. Each opens with a Chapter Objective describing what you will be able to do by the end. Understanding the Opportunity explains why the strategy works and when it makes sense for your agency. Step-by-Step Implementation breaks the strategy into practical actions you can take this week. Realistic scenarios show how weak and strong approaches play out in real situations, and sample conversations and scripts give you language you can adapt. Mistakes to Avoid highlights the errors that damage relationships or create

compliance concerns. Each chapter closes with Action Steps—an assignment to complete before moving on—and an Expected Outcome that describes what you should have accomplished.

Adapt the Scripts; Don't Recite Them

The scripts and letters in this book are starting points, not speeches to memorize. People can hear the difference between a genuine conversation and a recited pitch. Read each script, understand why it is structured the way it is, and then rewrite it in your own words, reflecting your agency's real strengths and your community's needs. The best script is the one that sounds like you on your most confident, helpful day.

Know Your State's Rules

Home care is regulated differently in every state, and marketing is no exception. Rules about what services you may advertise, how you may interact with referral sources, what gifts are permissible, and how government-funded clients may be approached vary widely. Chapter 5 explains the most important principles, but you remain responsible for confirming the specific requirements that apply to your agency. When in doubt, ask your licensing agency or an attorney before you act.

Set Up Your Tracking System Before You Begin

Before you make your first outreach call, set up a simple way to record every organization, every contact, every conversation, and every follow-up date. Chapter 7 shows you how, and Chapter 37 provides ready-to-use trackers. Client acquisition is built on follow-up, and follow-up is impossible to sustain if it lives only in your memory.

Take Action Every Week

Reading about outreach does not produce clients; doing it does. Commit to completing each chapter's Action Steps before moving to the next.

Chapter 38 will help you build a weekly marketing routine, and Chapter 39 lays out your first ninety days. Relationships take time to develop, and referrals rarely arrive after a single visit. The owners who succeed are almost always the ones who keep showing up—consistently, professionally, and with something of value to offer.

PART I

BUILDING YOUR CLIENT- ACQUISITION FOUNDATION



Before you knock on a single door, you need to know exactly whom you serve, what you offer, how you will be perceived, and how you will keep track of every relationship you build. The chapters in Part I lay that foundation.

CHAPTER 1

Know Exactly Who Your Agency Serves



CHAPTER OBJECTIVE

By the end of this chapter, you will be able to:

- describe clearly and specifically the populations your agency serves;
- distinguish between the people you are eligible to serve and your ideal clients;
- identify who makes, pays for, and influences the decision to hire home care;
- map the geographic area your agency can realistically staff;
- connect each population you serve with the people and organizations who already have its trust; and
- create your first referral map—the document that will guide every outreach activity in this book.

Ask a room full of new home care agency owners, “Who is your target client?” and many will give the same answer: “Anyone who needs home care.”

It is an understandable answer. It sounds generous and inclusive, and it reflects a sincere desire to help as many people as possible. It is also, from a marketing perspective, almost useless.

Consider what happens when an owner with that answer sets aside a Tuesday morning for marketing. Where should she go? A hospital? A