



zingage

# The Scheduling Playbook

Proven SOPs for Smarter Home Care  
Operations

Emily Isbell, Founder & CEO of 24/7 Solutions



# Table of Content

<b>Why-Centered Culture</b>	<b>5</b>
Mission Statement	7
Core Purpose	8
Core Values	8
Bonus: Departmental Purpose Statement	10
<b>Honesty Policy</b>	<b>10</b>
<b>Proper Communication Channels</b>	<b>13</b>
<b>Email Management</b>	<b>16</b>
<b>Managing Your Day-to-Day Operating Software</b>	<b>17</b>
Tasks	17
Missed Clock Ins	18
No Call/No Show	20
Late Caregivers	21
Scheduling System Search Tool	22
<b>On-Call Expectations</b>	<b>24</b>
On Call Schedule	25
1st, 2nd, and 3rd Strings	27
<b>On Call Training</b>	<b>28</b>
<b>On Call Reporting</b>	<b>29</b>
Call Logs	29
Timekeeping	30
<b>On Call Compensation</b>	<b>30</b>
<b>Hiring Independent On Call Supervisors</b>	<b>31</b>
<b>Summary</b>	<b>32</b>



Hi Fellow Home Care Leaders!

Thank you so much in investing your time and dedication to become an incredible service provider to seniors and your caregivers. I have always been a believer that leaders are readers. So, I already know that by making this time investment in this ebook you are providing exceptional leadership to your home care agency. My hope is that the principles I share in this book further support you in sustaining your leadership and continued growth in service hours in your community.

In case you are not familiar, I want to share a little about myself. I began in the home care industry in 2007 when I was a junior in college. After I had worked at that agency for five years, the owner took a leap of faith in me and purchased a home care operation in a different state for me to operate. Fast forward to 2020, and we had acquired seven locations across three different states, received awards for having the most market saturation from our franchisor and we were **serving one million hours of care a year**.

This didn't happen with ease. There were many lessons learned throughout the process, and this ebook is designed to help you avoid some of those challenges, so you can take a short cut to a more efficient, less stressful, and better quality scheduling operation.

At **24/7 Solutions**, we work diligently to provide home care providers with shortcuts on all operational matters in their home care business through a variety of services. From our **Powerhouse Peers program** for owners, operators, and administrative members to our one-on-one consulting service kickstart- **Cumulus Strategy Sessions**. If you are seeking a community of fellow home care owners, we also have that with our 24/7 Community.

Our mission is to empower home care leaders to build thriving businesses that elevate the standard of care, while achieving personal freedom and financial success.

We look forward to supporting you in transforming your passion into prosperity!

All the best!

Emily Isbell  
Founder & CEO of 24/7 Solutions



Hey, I'm Victor Hunt, CEO and co-founder of Zingage.

I wanted to share a bit about my personal story. When I was 8 years old, my mom suffered a brutal attack that left her needing round-the-clock care. The caregivers who showed up for her – day after day, night after night – saved my family. They gave us the chance to stay together, to rebuild, to be a family again. My grandmother was one of those caregivers. She was a nurse who started her own home care business because she believed that all care should happen at home, where people belong.

That's why I built Zingage: because home care saved my family, and I know firsthand what happens when it works, and more importantly, what's at stake when it doesn't.

Before starting Zingage, I watched agencies drown: schedulers chained to their phones at 2 AM, caregivers locked out in strange neighborhoods with no one to call, families terrified their loved ones wouldn't get care. I saw people burn out, quit, leave the industry entirely, not because they didn't care, but because the system broke them.

When I met people like Emily, I learned what happens when the system fails families who need care most. I've heard about the man who had to leave his wife's bedside during surgery to rush home because his mother's caregiver never showed. About the caregiver who passed away alone in her recliner, discovered only because an agency cared enough to do a wellness check. About the schedulers who handle crisis after crisis, staying professional through every call even when they'd rather scream into a pillow.

We're building the infrastructure so that doesn't happen anymore. So schedulers can sleep, so caregivers show up supported, so families trust that care will actually happen. For every bug we fix, every feature we ship, every call our system takes at midnight, there's a real person on the other end counting on us. That weight sits with me every single day.

What matters is that your team gets their lives back. That your schedulers can take a day off. That your care coordinators can do house visits instead of paperwork. That your caregivers know someone has their back. That your patients receive the care they deserve, every single time.

Thank you for trusting us with something this important.

Victor Hunt  
CEO & Co-founder, Zingage



# The Scheduling *Playbook*










# Why-Centered Culture

In Chapters Two and Three of my book, [The 24/7 Solution: Proven Strategies for Home Care Business Leaders](#), I dive deep into the importance of a Why-Centered Culture. This will be a great overview, but you may want to turn to those chapters if you want to dive deeper on this topic.

To begin running a successful home care business, you need to have the answers to the following questions: *who*, *what*, *when*, *where*, and *why*. Not only do you, as the owner, need to know these answers, but every team member also needs to know the answers. All of this has to be clear before you can excel in the *how*. To some of you, this is basic; to others, you may still be debating whether to provide care on the weekends, or whether to provide shifts where a caregiver sleeps at the client’s place overnight.

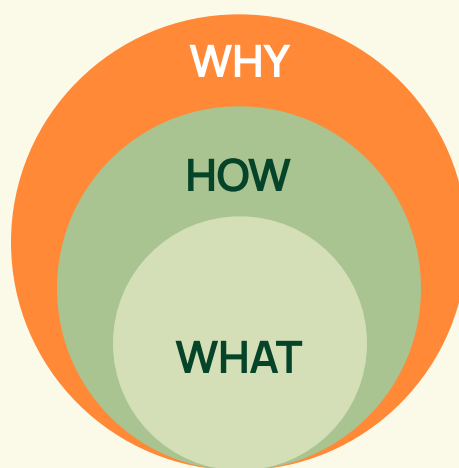
No matter your specific situation, here is a broad look at the answers. Let’s take them in order.

Who 	Seniors and senior care professionals
What 	Provide services to seniors, for example: ADLs, IADLs
When 	Based on the senior’s needs.
Where 	Primarily where the senior calls home.
Why 	Let’s discuss.

In his book *Start With Why*, Simon Sinek speaks on the concept of the Golden Circle. At the center of that circle is *why*, next is *how*, and following that is *what*. Over the course of his book, Sinek provides examples time and time again of business leaders who turned around existing businesses or started incredibly successful businesses, all because of their core understanding that their *why* is at the center of everything they do. He proved the power that a “why-centered culture” can have on a business.



## Golden Circle



We will continue to discuss the importance of having *why* at the center of everything you do as a leading differentiator in running a successful home care business. We'll also hit on a common mistake home care business leaders make when it comes to communicating their *why* and utilizing it in leadership, scheduling, and service to seniors.

In 2012, at a time when Best Buy was struggling to keep their stores open, Hubert Joly became its CEO. Because of Joly's stubborn and confident mindset, which was focused on a "why-centered culture," he was able to turn the business around drastically and eventually squashed the competition. Over and over, there are examples where a "why-centered" leader steps into an organization and improves revenues *and* profits. What you don't hear about is the time these leaders spend swimming upstream, bringing the stakeholders on board with their *why*, then getting stakeholders to thread the company's *why* throughout the culture and day-to-day operations. Creating a culture around a mission takes much more than writing a mission statement and putting it on your website, documents, and even a plaque on the wall.


The good news? The home care industry makes the mission part easy. I haven't met a home care business owner, senior care industry vendor, caregiver, senior, or administrative team member who doesn't have a personal story as to why they work in or near the home care industry. Finding your *why* or your team's *why* isn't hard. So, why do you do this? Why are you a home care business owner? Why does your team do this? Why does your scheduling team do what they do to serve seniors?

### ***What's our why at Zingage?***



Right now, at this moment, there's a caregiver call out that will end in a hospitalization or worse. Families are drowning in chaos: spreadsheets, late-night panics, missed visits, caregivers churning at 80% per year. Zingage exists to end this. We're building the infrastructure so healthcare can happen in the home, so our parents can age with dignity, and so their children can live without sacrificing everything. Thousands of home care providers fight every day and night to put care in the home and keep people alive, employed, and healthy. We're here to give them everything to succeed.





You've likely heard the term "mission-driven culture." This is definitely a culture worth aspiring to, although I believe there is a more holistic culture to seek. Inspired by Sinek's Golden Circle, I led and later coined the concept of a "why-centered" team culture. A "why-centered culture" goes beyond the company's mission, is driven by why you do what you do, but also has a handful of other key components that keep the company, ownership, and leadership in check.

### ***See the power of "why" at work:***

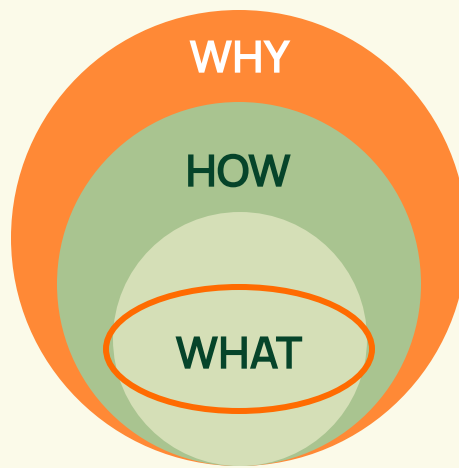
Ask every new caregiver at orientation why they chose to become a caregiver. Write down the names of those who have a personal connection to caregiving and those who say they're mainly looking for a paycheck. Then check back in 30 days. See who's still showing up, who's been on time, and who's had the most call-outs. Do the same at 90 days and 180 days.

What you'll notice won't surprise you. The people whose reason started with care are the ones who stay longer and perform better for clients. Some owners have even kept caregivers from quitting by reminding them of their why when they lost a client. That extra week often makes all the difference—and sometimes it's all they need to stay for the next client who ends up keeping them for years.

## ***Mission Statement***

If you are a franchise owner, the franchise has likely provided you with the mission for the company. If not, or you're an independent home care owner, take a moment to utilize the *Why-Centered* tool at [www.the247solution.com](http://www.the247solution.com) to develop your home care business' mission. I mentioned before that it is crucial to answer the questions *who*, *what*, *when*, *where*, and *why* before you can determine how you'll do it. While the what is summed up as services, such as providing ADL and IADLs to the who, seniors, I often say your mission statement is also what you do. If your mission statement is "to be the most responsive service provider to seniors," then that is what you do and what you plan to do for your community. This is a wonderful mission. However, to ensure a fully "why-centered culture," you need to enact your *why*.

A common mistake in the home care industry is believing that your mission statement is enough, or that it actually does enact your *why*. When providers fall prey to this faulty belief, they use their mission statement in every document signed by employees, on their website, and throughout their marketing material without realizing they are only staying focused on the outer edges of the Golden Circle, the *what*.



To help us get to the core, we need to go deeper than a mission statement. That is where the core purpose comes into play.

## Core *Purpose*

To truly develop a fully “why-centered culture,” you need to finalize a core purpose. This purpose, coupled with the mission statement, provides full clarity to your stakeholders as to why you show up to work every day and why your organization exists. Perhaps your core purpose is

*“To relentlessly pursue every avenue to provide seniors with independence in their home.”*

Coupling this with the mission statement above, your stakeholders would know that you are the most responsive service provider to seniors and you will relentlessly pursue every avenue to provide seniors independence at home.

Said another way, you’re going to show up in a pinch no matter what it takes to make sure seniors stay home. A daughter is going to know that you will not only be responsive to her needs, but that your goals also align with her goal to keep her mother home. Your company’s *why* mirrors the daughter’s why, and trust is built.

Both the mission statement and core purpose are key in providing quality service and exceptional leadership within your company. However, there is one key foundational piece still missing to develop a fully “why-centered culture” – a set of core values.

## Core *Values*

Without core values, your business will have an expiration date. There will come a point where you will be driven by your mission and core purpose so strongly that you fail to consider the harm you may cause to stakeholders along the way. Core values provide you with guardrails that keep you and your business honest. Some companies have more than twenty core values. Amazon has what they call their “Leadership Principles,” and these fluctuate between fourteen to eighteen in total. I personally recommend four to six succinct values.

Having fewer values ensures that your team can get to know them inside and out, so they can actually let them impact their behavior. Similarly, it allows you, as the owner, to know and embody them consistently. The more these are embedded into your culture, the better.

A well-known company that exudes a “why-centered culture” and keeps mission, purpose, and values top of mind is Southwest Airlines. One of their core values is “win the right way.” Let’s imagine a scenario with the example mission statement and core purpose from before, and a core value of “win the right way,” like Southwest.

**Mission:**

*To be the most responsive service provider to seniors.*

**Core Purpose:**


*To relentlessly pursue every avenue to provide seniors with independence in their home.*

**One Core Value:**

*Win the right way.*

With these three “why-centered” principles in place, a provider is much less likely to do whatever it takes at the expense of an employee. Instead of saying, “I don’t care if she worked the past twenty-four hours, we need her to go to this shift!” the leader and the administrative team members are much more likely to say, “How can we find another way to ensure this senior gets responsive care and this caregiver is able to rest?” **Core values ensure you do what is right, not just what is easy.**

**Incorporating AI into your culture**



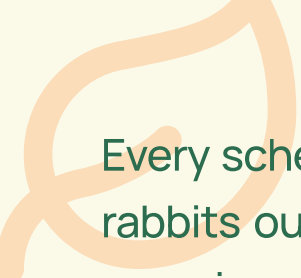
One of the biggest shifts in 2025 that we have detected - people are no longer hypothesizing about what it will be like when AI gets to home care. Instead they are thinking about the change management aspects of how to implement AI without blowing up their teams and their cultures. “Will AI take my job?” is one of the most gut-punch things a leader can hear from their people. (Now I know what some of you are thinking about one person in particular ‘If you don’t shape up it will take your job’). But by and large the home care leaders I know are looking for ways to grow their business substantially without adding back office headcount. What we’ve seen the best agencies do:

1. Make their people central to any introduction of AI (this is to free up your time/ protect your work-life balance/make you more efficient)

2. Have a strong culture that AI must support OR it will not be implemented.

3. Have clear problems the AI can solve for, that are ripe for AI (this is where a good AI partner is key)





Every scheduler knows that feeling when you’ve just wrapped up a day of chaos—pulling rabbits out of hats to fill open shifts—only to get a call from a client upset about how a caregiver cooked their food or made their bed. When you’d much rather hang up and scream into a pillow, you take a breath instead. You keep it together and make that client feel like they’re the only person who matters in the world. That’s the hard part of this work, and that’s also what makes it sacred. That’s your *why*. It’s the reason you keep showing up when others would walk away.

Keep in mind, the “why-centered culture” is a holistic take on being a mission-minded culture. Putting the mission of your company top of mind for you and your team is important, but it is only a portion of what it takes to embed a culture that is truly devoted to living out that mission and doing so with integrity.

Now that we have answered the questions, *who*, *what*, *when*, *where*, and *why* and tied them to a “why-centered culture,” we are finally ready to dive into answering the *how*. The rest of this ebook will speak to how you can run a successful scheduling department in your home care business.

#### Bonus: Departmental Purpose *Statement*

While it is not necessary to have a Departmental Purpose in place, we have found that taking this step has a great deal of impact on everybody’s *why* for showing up to work every day. Here was ours for our scheduling department:

- ✓ To optimize our caregiver base while creating winning matches to deliver quality care to our clients.
- ✓ To facilitate caregiver satisfaction and happiness by providing the number of hours desired to them while minimizing the number of clients cared for per caregiver to minimize caregiver Overtime.

## Honesty *Policy*

I will never forget the time my team member, Brittany, lied to a client. We had acquired this location about three months prior to the incident, and this team member worked for the previous owner. So far, she had been a rockstar! She had fully embraced our approach to running home care operations and was excited to execute upon the structure. When she told me directly that she had lied, I was conflicted. She looked at me with shame and sadness and admitted to her attempt at deceit right away, instead of waiting to be caught. Her posture was appreciated; she didn’t take it lightly. But at the same time, she did lie. Here’s what happened.

One week prior to the incident, a client was very upset with us about the revolving door of caregivers he was seeing. We'll call this client Mr. Jones. It wasn't because he had to train them; in fact, he understood that with his ad hoc schedule, it was difficult to have the same caregiver every time, and he didn't mind orienting them to his mother's needs. Instead, he was upset because the revolving door of caregivers could never find his house and that made them consistently late.

In order to make things right, we agreed that moving forward, we would always guarantee an introduction of the caregiver at the start of his shift. This would mean that we took ownership of making sure the caregiver found the home, and if they couldn't, we would be there until they arrived and then orient them to his mother's care. He was pleased with this solution and grateful for our problem-solving.

The very next shift, the client called 3 minutes after the start of the shift asking where his caregiver was and why we were not there to introduce the caregiver. In Brittany's desire to protect our reputation, she quickly said, "Emily is stuck in traffic." The client scoffed, said "okay", and hung up abrasively. Brittany ran to my office and said, "I told Mr. Jones you were stuck in traffic!" Completely confused, I had her catch me up, and ultimately, in her worry about disappointing the client with the truth- the truth being that she forgot to schedule and inform me about the introduction I needed to conduct- she made up a lie to buy us time. I rushed out of the door and headed to the client, who was *45 minutes away*. You can imagine how the rest of the story went after I arrived nearly an hour late and, unfortunately, right before the new caregiver finally found the client's home.

The next morning, I typed up the following policy, spoke to Brittany about what happened, and gave her grace. I knew Brittany was simply trying to do her best, and it was my job to teach her how to take ownership and provide quality customer service at the same time.

*At Zingage we have a saying: Don't let care become fear.*



We've all called the wrong caregiver at the wrong time or asked a favor from someone we shouldn't have. Nothing hurts more than when trying to do good turns into a mistake. But intention alone isn't enough: it only matters if our actions match it.

If the last step we take is a mistake with no ownership, then that's all it ever becomes. The hard part about home care is that everything can go wrong, and that's what makes it so hard to always be right. You're constantly balancing compassion with chaos.

That's why great process and great documentation matter so much. They protect our intent. They make sure we don't unlearn what we've worked so hard to get right, and that every action truly reflects the care behind it.

# Honesty Policy

One thing that cannot be taken away from an individual or an organization is their integrity. Integrity is maintained by being consistent in your actions, values, methods, measures, and principles. Integrity cannot be taken away by anyone else, but we can toss it away by simply not maintaining that consistency.

{Company name here} values our culture. As a part of this culture, we must build trust. The foundation of any relationship is trust. In order to build trust, we must be reliable, professional, and responsible.

Being reliable means we will keep our promises, we will show up on time, we will be there no matter what, and because we do that, the community can depend on {Company name here}.

Being professional means that with every interaction, whether positive or negative, we will show the respect the other person deserves and live by the Golden Rule- treat others as we ourselves would want to be treated.

Being responsible means that we will handle situations that are not always easy, we will accept responsibility for the mistakes we make along the way, and we will respond to needs as they arise. One of the keys to building trust is through strong communication. Strong communication amongst the administrative staff, strong communication with Caregivers, strong communication with clients, strong communication with families, and strong communication with the community.

As a member of this team, I understand the importance of telling the truth even when it is difficult and may make a client, caregiver, or family member upset. As an administrative team member with {Company name}, I promise to honor the Honesty Policy.

Staff Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_

Date: \_\_\_\_\_



## Proper Communication Channels


One of the biggest obstacles in home care is communication breakdowns.

A client cancels a shift in advance because their daughter will be in town, and a caregiver shows up anyway. A caregiver calls out at 2 a.m., and the on-call supervisor forgets because she was so asleep when the call came in, and now no one is there to give the client medications or breakfast. A daughter mentions that she is considering moving mom into a facility while updating her weekend hours of care, and the scheduler never mentions it to anyone else- only for that daughter to cancel care two weeks later and

abruptly remove her mom from the home she has lived in for 60 years. All of these are real-life examples from my time operating home care businesses, and they still stand true today with many of my clients. The thing is, it's almost impossible to achieve perfection because we are people depending on people. And no matter what we do, communication can be quickly detoured when a no call no show occurs or a client has a bad fall from the toilet while the caregiver was helping. Suddenly the consideration of a daughter moving their mom into a facility is far from the priority of the present moment.

I often say to 24/7 Solutions clients that we're not trying to achieve perfection, but we definitely want to do everything in our power to stack the cards in our favor.

Here are some simple practices we had in our offices that helped us prevent communication breakdowns



### How Zingage solves communication breakdowns

Schedulers have trust issues.

One of the biggest problems we've had to confront is schedulers are control freaks and have trust issues (sorry, but if you're a scheduler, you know I'm right). They're so used to communication breakdowns that they just remain hyper-vigilant at all times.

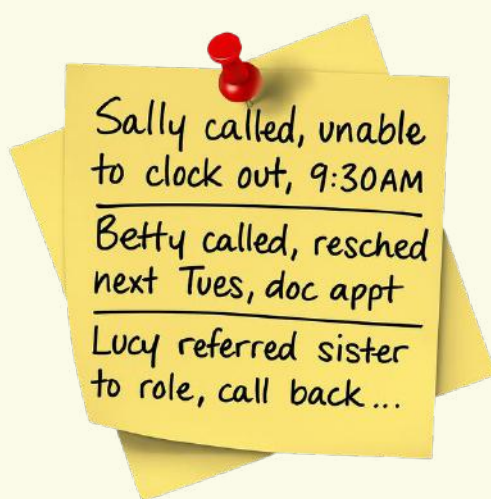
So we built a super-meticulous portal that surfaces every call, text, and note our ai/team make so there's never any doubt where any issue is in process. Could be something to help your team chill out after hours

### Preventive Comms *Best Practices*

1. When someone called and the person they were calling for wasn't available, we never took messages.
2. Schedulers managed scheduling matters only. If a concern unrelated to a schedule was discussed, schedulers were trained to ask the caller to leave a voicemail/speak with the individual who needed to know this matter.



3. Scheduling was second to answer phones; we assigned our Human Resources Department to be the first to answer phones. Interrupting HR was less detrimental than interrupting Scheduling.
4. We didn't accept client scheduling changes from caregivers; we required them to have the client call us or to hand the phone to the client to confirm the changes.
5. We didn't clock in/out caregivers; we required that they do this through the system. In the event of rare technology issues (<5% of the time), we would clock them in/out after confirming with the client verbally that they had just arrived/were departing.




## An Ode to Sticky Notes

If the scheduler is Batman then sticky notes are Robin. We've all grown to love and hate those fun little office pads. They're loyal, colorful, and always within reach but they multiply like gremlins. Every note starts as a reminder, then becomes a clue in a detective case. "Who called? What shift? Which Tuesday?"

In home care, sticky notes are where structure goes to die. They're the ghosts of every missed clock-out, last-minute call-off, and caregiver lead that never made it into the system. But they also tell the truth. Our work is human, messy, and always in motion.

At Zingage, our mission isn't to kill the sticky note. It's to evolve it. To turn every scribble and scramble into something that actually talks back, reminds you, and never falls off the wall.



One of the biggest communication skill sets I would encourage you to hone in with your schedulers is the ability to redirect. This is tough because for schedulers the day-to-day can become a little less exciting at times, and it can be exciting and a new change of pace to have a new problem to solve for a client or caregiver. The reality, however, is that while they may be able to help, there are enough times where their help actually leads to a domino effect of errors. Even though I oversaw the operations, I would lean on the power of redirecting, often saying, “I don’t trust myself to take this message exactly as it needs to be said, so I’m going to send you to Susie’s voicemail so she can hear it directly from you.”

The key here is that your team members embrace incredible customer service. The caller on the other end has a limited relationship with the office and a majority of it is through the phone. In addition, this may be our 15th call that day, but this is their first time calling in three weeks. So even if we are not the one that should be taking the message, handling the concern, or who knows the answer – we need to make sure we’re not simply saying “please hold” or “Susie handles that, but she’s not here. \*click\* ‘Hi you’ve reached Susie, I’m either on the phone or away from my desk. Please leave a message and I will get back to you as soon as possible.” Instead, let’s teach our team to add a bit of context. For example, “Susie is on the phone right now and has another call waiting. I’m going to send you to her voicemail so you can let her know directly, and she will follow up with you with any further clarification she may need.” In this example, you can see that we didn’t ask if we could, but we added context around why we must transfer the call and confidence around the fact that this caller will be taken care of.

One last note on communication. It is common for your team to know the answers. It is really important that even if they know the answers, they redirect. It’s not that you don’t trust them to know the answers; it’s because the person they need to speak to, who owns that matter, may have a lot more information they need to gather to better serve them.

### Can AI improve customer service?



"Oh, and one more thing"

This is the last thing a scheduler or coordinator hears before the next 13-17 minutes of their life are taken up on a circuitous conversation through all the things that a caregiver needs to talk about at a given time.

And the other office staff see that person stuck on the phone and just give a little half smile.

When that happens for the 5th time, it can be hard to maintain the same level of energy and friendliness





Or the 7pm call about a paystub or time off in 2 weeks.



This is where we've seen AI voice shine. It never misses a call, never gets impatient, and is able to parse all the different issues a caregiver or client might bring up.

You can test our voice AI at [Zingage.com/demo](https://Zingage.com/demo)

## Email *Management*

An often overlooked and assumedly understood form of communication is email. As a part of our training process and the training I teach in [\*The 24/7 Solution: Proven Strategies for Home Care Business Leaders\*](#), we always took every new administrative team member through a thorough Training Sign Off. Included on this Training Sign Off is an understanding of Email Management expectations.

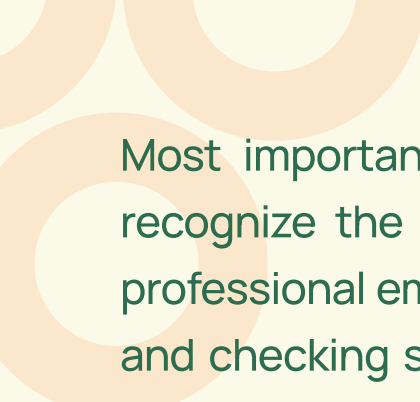
In the very busy world of home care, we have to focus on controlling our controllables, and a great deal of that is staying organized. That is especially true when it comes to the Scheduling team. Poor email management can be a very insidious customer service issue. Especially when our customers, both internal (caregivers), external (clients), and their families, are only reaching out to our office on occasion. These occasional moments are small moments where we can either build great trust or completely lose the faith of our customers.

As you onboard your team members, make sure you set expectations on email responses. We had a specially laid out turnaround response time for all team members, and our recruiters and schedulers expectations were the most strict.

**Must respond within 4 business hours**

We made a clear expectation that email needed to be managed in a timely manner, and not just read, but at least a very fast response must be given. We trained our team to realize they may not have the answer yet, but to communicate a deadline by which they would follow up with an answer, simply to ensure the customer felt heard and trust was built with our customer base.

Beyond responding, we trained our team members on how to create folders in their inbox to keep their emails organized and archived. We taught the principles of Inbox Zero: Cutting Through the Crap to Do the Work that Matters by Merlin Mann. By doing this, we knew when they received their very first email, they were set up for organizational success.



Most importantly, we provided training on email etiquette. We wanted our team to recognize the difference between writing a casual text to a friend and composing a professional email to a customer. In addition to stressing the importance of proofreading and checking spelling, we also emphasized the need to be thoughtful about what they put in writing, understanding that every email reflects the business

## Managing Your *Day-to-Day* Operating Software

Garbage in, garbage out. I'm sure you've heard this before, and that's because it is very true. The software you are investing in for your business is only as valuable as you make it. If you know that you are not optimizing your software's features today, I strongly recommend taking yourself through a software check-up with one of their representatives. Simply reach out and ask them if they can treat you like a new customer and take you through a refresher training on the software's features. If you're like me, you may be a bit of a slow learner, and going through this exercise with a bit more understanding of the basics can be invaluable for your business.

Technology is ever-changing, but there are a few basic features most operating softwares have for their home care business. We're going to dive into those and ways to help you support your staff with optimizing their features and utilizing those features to help you provide incredible customer service and efficient operations.

## Tasks

In home care operations, tasks serve as a central tool for keeping work organized and accountable. When onboarding new administrative team members, it is important that you set the expectation that all tasks must be completed on time and marked accordingly once finished. When training on this, I would explain how abusing the task process and claiming a task was done when it wasn't is falsifying records. Make sure that your team understands the weight of this obligation in your business.

Similar to Inbox Zero, tasks need to be managed in the same manner. The combination of an email notification and the task within the software provides a double layer of reminders to help ensure nothing is overlooked.

Since working with a large variety of home care clients, I know it is possible that tasks may have gotten out of hand in your office. If not, well done. Keep it up! But, for those who have thousands of tasks never accounted for, I recommend starting over and implementing a new policy that requires your team to adjust their habits. Find out how you can get a clean slate with your software provider and then set a go-live date with your team about task management expectations.

I do not believe in leading with an iron fist, but I do believe people need to understand there are consequences for not meeting expectations. When introducing the new expectations, be sure to paint a picture for your team on how you plan to inspect the completion of tasks on a daily basis for a number of weeks. I would also be clear with your team about the possible disciplinary action that may come if they do not make efforts towards ensuring tasks are completed.


By maintaining strong standards, the tasking system becomes more than just a checklist. It transforms into a reliable system of communication and accountability that protects client trust, supports team efficiency, and provides a consistent operational rhythm across the organization.

## Missed Clock Ins

I'll never forget working with a client and asking the question, "How do you manage alerts about caregivers not clocking in and out for their shift?" Their answer, "Julie reviews at the end of the day to make sure everyone made it." You read it right- *the end of the day*. Is this your protocol? If so, if there isn't anything else you change from reading this ebook, please make sure responding to missed clock in alerts immediately is the one thing you change in your business.

I have been in home care since 2007 and remember depending upon blind faith that individuals would show up for their shifts. As soon as the technology became available, our care quality rose tremendously. Gone were the days when seniors would tell their daughter the next day about how there wasn't a caregiver the day before. Finally, we had a way to respond quickly in the event that one of our caregivers hadn't arrived for a shift.

It is important to put high expectations around these particular alerts. As a leader of the organization, I would make a habit of noticing alerts and asking about them. I do not recommend micromanaging every alert, but instead, every other day, notice an alert and take a moment to check in with your staff about the situation. Simply asking, "What is the story with Ms. Jones' missed clock-in?" is enough to help your staff understand that being on time matters and it's our administrative responsibility to provide dependable care.



**\*Refreshes WellSky one more time\***

In private pay, missed clock ins/clock outs usually aren't the end of the world. The caregiver is probably there, and it will cause some headaches for the back office. And following up on every missed clock-in/out is such a hassle.

But it only takes one secret no-call-no-show masquerading as a missed clock in to cause a huge problem.

Right now, Zingage Operator is checking on missed clock-ins to ensure EVV compliance for medicaid agencies and to ensure clients are being cared for. It's happening on auto-pilot, saving a ton of stress, headache, and vigilance for home care teams.



A word of caution about alerts, it is easy to have three in a row and, in the hustle of day-to-day operations and frustrations in scheduling, we can become a bit curt as we reach out to caregivers. I was very passionate about setting a standard of assuming the best when reaching out to caregivers. Even though a percentage of missed clock-ins were true no call no shows by unreliable, unprofessional, poor hires, I never wanted our staff to assume that to be the case.

Having this *assume* the best expectation truly paid off when one of our caregivers in 2014 was a no call no show. My Scheduling Coordinator left her a voicemail to check on her and make sure she was okay, since she hadn't shown for her shift. In addition, she contacted our caregiver's emergency contacts to check on her well-being and see if they knew if she was okay. From there, we took care of the client and moved on, assuming that it was just another no-call no-show.

The next morning, while I stood in my kitchen making my morning coffee, the caregiver's daughter called back to let us know that she had checked on her mom after our wellness call. Still half asleep, I nonchalantly acknowledged what she said. Then she followed it up with, "I wanted you to know that I found my mom in her recliner unresponsive. The doctor said she likely had a blood clot in her leg and that was the reason for her passing." I was speechless.

I was also incredibly grateful that my team member had acted in a very courteous manner, followed our protocol to contact emergency contacts, and met the needs of the senior. Make sure your team members understand the impact they can have on someone's worst day - whether it's good or bad.

Beyond making sure your team members follow up timely on Missed Clock-Ins, it's important that you arm them with expectations on what to do if there is a no-call, no-show. Our next section dives into the protocols we had in place to maintain trust with our clients and in our communities.

### **Technology can't replace empathy, but it can extend it.**



Today, a scheduler's empathy reserves may already be depleted by all the fires to put out. They've had to make too many decisions and get in the weeds to the extent they're not fresh when it really counts.

The moment a caregiver misses a clock-in, the right system surfaces the context, past punctuality, client risk level, and proximity, to help teams respond with care instead of panic.

The right technology can protect the decision making batteries for office staff, so they can respond with empathy and compassion when they're really needed.



## No Call/No Show

If you've heard me speak, you've likely heard me reference my grandmother's story. My grandmother eventually needed home care and thankfully had a long-term care insurance policy to help cover her services. Unfortunately, my grandmother did not live in the franchise territory I covered, so I couldn't help her directly. After trying to connect my grandmother with a fellow franchisee and being disappointed by the owner's responsiveness and sense of urgency, I encouraged my mother to seek out an independent home care agency instead. After a much better first impression, we began care for my grandmother.

I'll keep the story short, but I can factually say that in my grandmother's 3 years of care, she experienced no less than 40 no call no shows. Every no call no show came with a phone call that said "Our caregiver has not made it, and we cannot reach them. I'm sorry, but we do not have anyone else to send." Around 2.5 years into service, my mom was scheduled for an outpatient surgery. Leading up to the date of the surgery, my mom called 5 times to confirm the schedule and reiterate that both she and my dad would be at the hospital for my mother's surgery.

This meant neither of them would be available to make breakfast and ensure my grandmother's medication was taken, so they were fully relying on a caregiver to show up as scheduled.

As you may already be predicting, on the day of the surgery, my dad received the phone call. "Our caregiver has not made it, and we cannot reach them. I'm sorry, but we do not have anyone else to send." My dad went from being an anxious spouse to a resentful son. He was forced to travel 20 minutes to help my grandmother get her necessary medications and start her day, then rush back to the hospital in hopes of making it in time to be there for my mom as she woke up from surgery. Don't get this wrong, my dad was an incredible caregiver for my grandmother. He would do anything to make sure his mother was taken care of, but in that moment, he needed someone to be dependable and allow him to take care of his wife.

This experience for my grandmother is a large reason why I do what I do today. I'm not concerned with your branding or logo; I'm concerned with your sincerity in being a reliable, trustworthy home care agency. And I want to help teach those with that level of sincerity the correct protocols to have in place so they can gain the biggest market share and ensure no one else has the experiences my grandmother had with her home care provider.



In the last section, we discussed the story about how my team member followed our protocol to contact emergency contacts in the case of a caregiver's no call no show. Now I want to dive a bit deeper into the expectations, both in the direction of the caregiver and the client. This is the protocol that we had for all of our offices to ensure no client was ever without dependable care. To keep it quick and procedural, here was the expectation.

### No Call No Show Protocol

Call the caregiver that is scheduled to see what happened. If unable to reach the caregiver, all emergency contacts for the caregiver need to be contacted. If you are unable to reach anyone, you must assume they are a no-call no-show.

1. Remove the CAREGIVER from their schedule.
2. If it's a 24-hr. client, ask the CAREGIVER that is there to stay until you get there or get another CAREGIVER.
3. If it's not a 24-hr. client, call the client to let them know you are on your way
4. Call your backup team member to let them know you are going to work the shift; your backup will then work to get you relieved.
5. Go work the shift until you are relieved.





## Late Caregivers

Once you determine that a caregiver is late versus being a no-call no-show, it is important to discuss their plan of correction. Don't let that sound too rigid in your mind, it needs to be clear to the caregiver that the behavior was noticed, isn't acceptable, and we owe the client a way to make it up to them.


Arm your caregiver with how to communicate to the client in a way that is both calm and apologetic, while also communicating to the client on how they will make right for their tardiness. Do not assume that a caregiver will provide the exceptional customer service you would provide if you were the one to arrive 20+ minutes late. Take the time to lead them on this; your reputation relies on it. In addition, evaluate if the shift can be longer that day. Meaning, can the caregiver stay 30 minutes late to ensure the full 6 hours are served and the senior receives their full time?

As administrators, we assume that caregivers will show up and handle situations with the same level of professionalism, ownership, and care that we do. The reality is, a majority of the time they will not. As their superiors, it is not our job to get angry when they do not meet our expectations, instead, it is our job to help them know how to meet our expectations in the first place. And more importantly, provide an incredible customer service experience.

## Scheduling system *search tool*

I have found with Emerging and Evolving\* home care businesses, this is one of the most under-utilized/optimized features utilized in the software. As mentioned before, garbage in, garbage out. So often, home care businesses that are succeeding and achieving around 50-60,000 hours of care a year can do this with the power of a very effective single scheduler. However, what often happens here is their business plateaus because that scheduler is a linchpin to their success. As a linchpin, the business is fully reliant on what is held in that scheduler's brain versus what is held in the software.

A few years ago I was the Chair of a non-profit board. The board was tasked with overseeing a difficult employee and trying to figure out how we would move forward. His oversight of other staff was not received well, he kept information from his staff and never trusted them to do their jobs so he just did it for them. As the board discussed this rather challenging gentlemen, I'll never forget one of the board members suddenly adding, "It's as if he wants to be the only one that knows grandma's secret cookie recipe."



My point in sharing this is that there are a lot of incredible schedulers out there helping provide an invaluable service to seniors and caregivers, but they also have the fragility in their ego that makes them hold on to the special recipe of every caregiver's desires and every client's nuances when it comes to matching. I do not believe it's a reflection of their leader; I believe it is simply a personality type that exists. As owners, we need to recognize this weakness, provide job security to our scheduler, and help them embrace scaling the organization so that more people know the secret recipe and the entire organization can flourish **with** the scheduler.

Our process for updating matching criteria in our system was to get this information from the beginning. At the start of an interview, we made sure we knew what the applicant could and couldn't do. We would then revisit again at the very beginning of their orientation. We have them sign an acknowledgement form speaking to what they could and couldn't do. This acknowledgment form would also include the hours per week they desired, the locations they were willing to serve, and the weekly availability they had to work. The responsibility for gathering this information was on the individuals responsible for recruiting and retaining caregivers, which we typically referred to as Human Resources.

Keeping this in the ownership of the human resources department led to ensuring a commitment to all of the criteria the new caregiver acknowledged with a signature on their first day. If a caregiver attempted to change their commitments to the criteria, our scheduling team would redirect them to Human Resources. This process made it very clear to the caregiver that it wasn't a simple change, given their signed commitment.

By having all of this current from the beginning and processes in place to ensure data always remained accurate, we were always ready to onboard our next administrative team member and ensure they could start in the on-call rotation sooner rather than later. Operating systems need to be seen as an employee on your team that is meant to work for you. If your employees aren't equipped with the right tools, they will never be able to perform at the level you're paying them for. As you look at the expense of your Operating Software, ask yourself, can I honestly say I am getting my money's worth? If the answer is no, I would challenge you and say that it probably is not the operating software's inadequacies. As they say in the tech world, it's probably user error.

In short, client and caregiver preferences must be entered in the client and caregiver profiles for accurate and effective matching. For better matching outcomes, enter all preferences and matching criteria into the Scheduling system so the information is available for on-call staff and administrative team members with access to client or caregiver records. Preference examples may include:

## Preference Examples

1. Availability – search tool will only produce results if availability is accurate
2. Certifications and Credentials
3. Non-Smoking Caregiver
4. CAREGIVER ok with Personal Care – Female
5. CAREGIVER ok with Personal Care – Male
6. Smoking Client
7. CAREGIVER ok with Dogs
8. CAREGIVER ok with Cats

## On-Call *Expectations*

In this section, I'm going to share with you the On Call Expectations we had for our offices. This will be a lot less narrative and more procedural, but before we dive in, I want to share some experiences I encountered when acquiring existing locations. In the first acquisition, the staff telling me how on call was scheduled. Their approach was that it was whoever was last at the office. Seriously. So if you left early or "got your work done early," you could avoid being on call.

It was the on-call version of "last one out is a rotten egg". In turn, these individuals were motivated to work less on a Friday so they wouldn't have to cover the phones.

On call is a thorn in the side for every home care operation. Regardless of volume, experience, and even team member skillsets. It is just one of the difficult challenges of running a 24/7 home care agency. On-Call Supervisors handle everything from "how do you bake a sweet potato?" to true 911 emergencies at 2 a.m. The constant uncertainty of never knowing whether the next call will be minor or catastrophic can take a real toll on your team's stress tolerance. In my 14 years of operating home care businesses, I have seen administrative members crumble under the pressure and have heard neighboring franchisees' horror stories where the on-call supervisor slid their key under the door and left the on-call phone for someone else to handle. Completely abandoning ship. You may have your fair share of horror stories as well.

### How Zingage Helps with On Call - pulled between outsource and lose control and keep in house but die



What breaks most teams isn't the call volume, it's the unpredictability. The strongest operations build safety valves: clean handoffs, visible queues, and support systems that prevent burnout. The goal isn't to remove the hard nights, but to make them survivable.



I will not sit here and preach to you about a utopic version of on-call for your office and tell you that you just haven't figured out how to handle it. What we do is tough work and requires a lot of emotional labor. There is nothing that will change that. What I will tell you is how we were able to stack the cards in our favor to mitigate as many stressors as possible for our staff and for me as the operational leader.

## On-Call *Schedule*

It's important that all administrative team members understand the nature of a 24/7 business and their requirement to participate in an on-call rotation. Once this is clear, getting a handle on managing on call starts with setting a proper schedule for your administrative staff to rotate the responsibility.

For Emerging businesses, that rotation may include you, the owner/operator; however, the sooner you can build your team and pull yourself out of the rotation, the better it is for everyone. As the owner/operator, you are always on call 24/7 to the business's needs. You need the respite from the business so you can come in recharged, ready to lead your team every morning. First, second, and even third lines of defense need to handle and filter matters before you are contacted.

We always hosted an On Call scheduling meeting. In order to create layers from my supervision of office staff to the On Call responsibilities, I always assigned the Scheduler the On Call Supervisory role. They were responsible for ensuring the on call schedule was developed and covered, and they were the host of these quarterly meetings. This allowed them to call on me in times of conflict and provide neutral support in solving a problem with on call coverage. This delegation also allowed the stressor of on-call management to be dispersed among the team, versus carrying the weight of managing everyone's on-call nuances solely on my shoulders. Because, like I said before, I was on call 24/7. It was okay for me to protect my time, and it is okay for you to protect yours, too.

In the process of developing the on call schedule, team members would plan the next three months of schedules. For example, on March 1st they would plan April through June. This gave them four weeks to plan for April assignments. The on call schedule needed to ensure that every evening and weekend, a 1st string On Call Supervisor was assigned. The 1st string supervisor's responsibility was to ensure they were first to answer the phones and handle the business solo. Their number one responsibility was to ensure clients and caregivers (current and future) received the same level of attention and care on Saturday at 9 p.m. as they would on a Tuesday at 10 a.m.. Their secondary responsibility was to ensure the remaining office staff were able to enjoy their time away from work without a phone call about work.

In order to honor the secondary responsibility, we created a system of having 2nd and 3rd string team members in line for back-up support. In the early years, we only had the human capital to cover a 1st and 2nd string. If you are a smaller organization, that system will work for many years for you as well.

The 2nd string team member’s responsibility was to be available to take over on call responsibilities in the event the 1st string had to go to a shift and provide coverage, conduct an introduction/meet and greet, or conduct a care consultation.

## Tip for Emerging\* *Businesses*

Once we had a full-time sales representative, we pulled consultations with new clients off of the on call supervisor’s responsibility and placed the sales representative into an on call rotation with the owner/operator for intake. Also important to note that in your early stages of business, it may just be best that the owner do the consultations on the weekends until you can grow to the point of affording a full-time sales representative.

The 2nd string team member’s responsibility when taking the phones (because the 1st string had to go to a shift) was to work quickly to find coverage to replace the 1st string with a caregiver. Both 1st and 2nd string were compensated for their time during this time; however, the 2nd string is motivated to not get the next call out, so their behavior naturally leads them to work very effectively to find the 1st string relief from their shift. Once the 1st string has been relieved, they’re back to being responsible for the needs of on call.

While developing the on call schedule, both 1st and 2nd string were established for all after-hours and holidays. I receive a lot of questions about how the schedule should be broken down. Should it be 7 days on? Or should it be rotated daily? Or a mix in between? My answer is always, what does your team want? As the owner/operator, you don’t really care how it is accomplished, you just know that it needs to be. My advice is to get the buy-in of your team and have them decide their preferred path. For many years, we handled on call in this way:

Week 1

Staff Member A: Monday - Friday morning

Staff Member B: Friday - Monday morning

Week 2

Staff Member C: Monday - Friday morning

Staff Member D: Friday - Monday morning

### Week 3

**Staff Member B:** Monday - Friday morning

**Staff Member A:** Friday - Monday morning

### Week 4

**Staff Member D:** Monday - Friday morning

**Staff Member C:** Friday - Monday morning

As the volume increased, we cut it back to a rotation of Monday, Tuesday, Wednesday, Thursday, and then weekends. So something like this:

### Week 1: Weeknight coverage meant until the next morning

**Staff Member A:** Monday

**Staff Member B:** Tuesday

**Staff Member C:** Wednesday

**Staff Member D:** Thursday

**Staff Member A:** Friday - Monday morning

As you grow, your volume of calls during after business hours will increase. The toll this takes on your team members will have an effect on their day job. It's important that you keep a pulse on this as you grow, but again, present the staff with options to adjust how they cover it and ultimately let them decide. Dictating the best coverage will only create an attitude of resentment. It's hard to be mad at how something is handled if you were part of the decision-making about how it would be handled.

## 1st, 2nd, and 3rd *Strings*

I explained in the section before the value of 1st and 2nd string. As our organization grew, I developed a benefit for team members with seniority and leadership in the form of 3rd string. 3rd String On Call responsibilities were handled by those with the most experience at the company and rotated. This typically ended up being 1-3 individuals at an organization. The perk for these team members is that they were no longer a part of the 1st or 2nd string rotation. Instead, they filled in for my seat to handle executive-level issues that may arise after hours.



Given their time working with me, they often had years of experience to lean into on handling matters the way I would want them handled. The individuals offered this benefit were team members who had proven a strong level of discernment during day-to-day operations. An example may be handling a worker comp first report of injury with the detective-like mindset I would have upon receipt of the call. Similarly, they had proven the ability to de-escalate upset clients and caregivers. Overall, they had the leadership skills to help the 1st and 2nd string team members handle matters effectively.

Once I implemented the 3rd string team members into the rotation, my obligation to day-to-day operations was drastically reduced. While I'll admit this reduction allowed me to have personal time and enjoy a vacation more than ever before, what it really did was give me the space to scale operations and expand into additional locations.

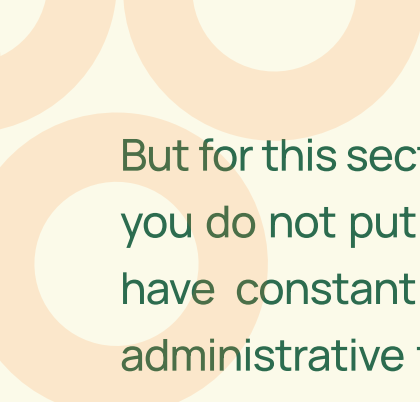
## On Call *Training*

I believe most of the challenges we have with administrative staff in the home care industry can be tied back to poor training. Just the other day, I was speaking with my friend who works remotely as a supervisor of ten people for a tech company. During our discussion, I asked if they required a college degree for their staff. The answer was no, and she went on to explain that everything they have is proprietary so they would have to train you from scratch no matter what. A college degree didn't prepare individuals to work with their products, so it wasn't required.

My mind immediately wandered off into thinking about home care. If you've followed me for very long, you know that I'm a huge fan of developing a career path within your organization and growing your business with promoted caregivers. That is my story; I wouldn't be here today if someone hadn't made that path possible, so of course I'm very passionate about this.

Unfortunately, that concept is not as popular in the home care industry as a whole. And I think it's because owners and operators believe that individuals from previous home care operations come trained and ready. While they may not require a college degree, they do require experience in the industry because their opinion is that it will not require as much training.

This mistaken belief is the Achilles heel for a lot of owners and operators and a big reason why their businesses are not flourishing. This applies to training in all aspects of their business, not just on call.



But for this section's purpose, I want to speak to training on call. First of all, make sure that you do not put someone in on call and see if they sink or swim. That's a sure-fire way to have constant turnover in your office. Our process was fairly simple. All of our new administrative team members who would be a part of on call (meaning everyone except for Sales Representatives) would spend a minimum of 3 days working in the scheduling department learning all things scheduling.

After they were signed off by scheduling, they were then placed on two week nights for a couple of weeks in a row. They were assigned 1st string, but it was understood that as the newbie, they would/could lean on their 2nd string team member for general questions/concerns a bit more.

After a couple of weeks handling a handful of weeknights, the new person would be given a weekend to cover. Again, it was understood that they may need to lean on the 2nd string a bit more, and the 2nd string understood this responsibility. We often matched them with a scheduler, meaning their 2nd string team member was someone from the scheduling team. After completion of that weekend on call, they would then be signed off and ready to be fully independent as a 1st string on call supervisor. The sign-off process was an acknowledgment to all that they knew they were only to reach out to 2nd string in the event that they had to go to a shift, conduct an introduction/meet and greet, or conduct a consultation. Creating firm boundaries that protected everyone's time off was very important to me. I knew firsthand, as a previous administrative team member myself, how critical that time off was for recharging and doing my job well during business hours.

## On Call *Reporting*

There are two different types of reporting when it comes to on call. Timekeeping and Call Logs. It is important that your staff take these report expectations very seriously. As mentioned before, they are running the business solo, and it's vital that what occurs after hours is communicated back to the office during daytime hours.

### Call Logs

Operating Systems offer a lot of ways for calls to be logged and connected to the individuals the notes affect. This is a very effective way to document calls that come in during and after business hours. I am a bit old-fashioned and I required the scheduling team to keep a handwritten log on a notebook during office hours and for the on-call supervisor to do the same. I won't belabor you with the power writing in hand has on memory retrieval in our brains, but I will share with you how this process allows for a layer of protection to ensure all matters are addressed.

For schedulers during office hours, it was expected that at the end of the day, they reviewed their journal and used a system of either highlighting, checking, or crossing off the notes to ensure every issue was addressed. It was expected for On Call Supervisors to do this as well. However, they were expected to keep clear enough notes so that on Monday morning the On Call Supervisor of the Supervisors (I know, what a mouthful!) would be able to review and ensure all items were addressed. Furthermore, that supervisor would then report the high-priority matters to the Leadership Team during the Monday Morning meeting.

## Timekeeping

Timekeeping is vital for ensuring proper compensation for your administrative staff as well as keeping a timestamp and timeline of what happened during on call. While the call log may reference the date and time when a call came in, the timekeeping report would speak to the duration the on call supervisor took to solve a problem. For example if a caregiver called out of a shift at noon on Saturday for 8 a.m. on Sunday. The Timekeeping report may show that they received the call and had a 2-minute conversation. The on call supervisor may have chosen to finish their lunch with friends and go home an hour later to begin working on finding coverage. So the timekeeping report may say “Filled Sunday’s 8 a.m. shift” with a duration of “1:30 p.m. - 2:30 p.m.” I dive into the importance of this a bit more in the next section.

## On Call *Compensation*

I am not going to spend a lot of time here, as I am not an attorney and do not work for the Department of Labor. But I will tell you, just Google “home care business owes back pay,” and you will find pages upon pages describing stories of home care businesses getting in financial trouble. Some of the issues are about how they compensated caregivers and some regarding how they compensated their staff. What I will say, in short, is:

### Compensation

- ✓ Make sure your on-call time is compensated and that you do not consider it part of the team member’s salary.
- ✓ Make sure that the compensation is greater than the minimum wage required in your state.
- ✓ Require your on call team to keep a detailed record of the amount of time working while on call so that you can ensure you are compliant in this regard.
- ✓ Evaluate the blended rates of your administrative team member’s pay and ensure you are compliant with overtime rates.



Outside of legal concerns, I do want to add a very valuable hack I discovered at about year six in leading operations that saved me a lot of headaches. Prior to implementing this hack, I was always struggling to handle discussions around whether or not on call compensation was enough. As someone who had boots on the ground experience with On Call as an administrative team member, I tended to feel that compensation was very fair.

*There were so many weekends where there was barely an issue and I felt that I had won the lottery by earning money.*

One weekend my mom came to visit, and I painted every wall of my home while managing on call. I looked at it as being paid to paint my house– I was thrilled!

However, not everyone has my attitude, and not everyone has the same perspectives on a call out as I did. The pay for on-call was very subjective to the person who was on call even though it was the same rate across the board in our offices.

The hack I discovered, which prevented years of later headaches, was creating a sliding scale of compensation. Essentially, I showed that when we hit a certain number of hours per month, two months in a row, everyone's on-call compensation would increase. I set this up for hours of service that seemed far from possible at the time that I created it. But as we grew, we continued to review that sliding scale and adjust our compensation accordingly. By accident, I had created another motivator for our office staff to want to grow the business!

## Hiring Independent On Call *Supervisors*

While working with clients I know of a small, very small, number of offices that have unicorn staff members whose only job is to handle on call. These unicorns do an incredible job, never complain, and always ensure clients receive care. They do exist, and I do think it is worth trying to find them. However, I want it to be clearly understood that your team must never take them for granted nor believe they will always be there. As the leader, you need to prepare them for handling On Call in the event of their absence or their departure.

# Summary

In home care, I believe there are two common groups of ownership. There's the one group that is afraid to let go of anything out of fear of their business' reputation, the *"I'll just do it myself manager"*. And there is the other type who gives away authority on everything, the *"Set it and forget it. manager"*– usually sourced from their desire to have the entrepreneur story of working less and earning more.

I personally believe we need to find a middle ground between the two. That is where success in home care lies. You cannot have a well-oiled operation if you do not put in place systematic processes that lessen the chances of error and protect against poor customer service experiences.

Bill Gates is credited with saying, "The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency."

In order for you to scale your organization, to grow your business and serve more seniors than ever before, you must develop efficient operations. If you do not, growth will magnify those inefficiencies and eventually your business' reputation will suffer, in turn, your future profits will as well.

My hope is that this Ebook armed you with solutions to place in your business that helps you optimize the operations in your business. If you have any questions or concerns about anything you read in this Ebook and want direct advice from 24/7 Solutions, please reach out to us [here](#). If the information contained in this Ebook greatly served you and your business, we would love to hear from you as well!

This work isn't easy but it is necessary and makes such a difference in so many people's lives. Thank you for all you do for seniors and caregivers in your community. I cannot wait to hear how you have been able to transform your passion into prosperity!