

# 7 STEPS TO GROWING YOUR AGENCY



G E O H . A P P



# GUIDE TO GROWING AN AGENCY

Learn more GEOH tips on how to help your clients!

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# DISCLAIMER:

This guide is intended for home care agency owners and aims to provide valuable insights and information on various caregiver training topics. However, it is important to note that this guide does not cover all possible caregiver training topics and should not be considered exhaustive.

While we strive to ensure the accuracy and relevance of the information provided, we cannot guarantee that all aspects of caregiver training are included or up-to-date. Users are encouraged to consult additional resources and seek professional advice when necessary.

We disclaim any liability for any errors or omissions in the content of this guide or any actions taken based on the information provided herein. The content is provided "as is" without warranties of any kind, either express or implied. By using this guide, you agree to hold us harmless from any claims, losses, or damages arising from its use. Please refer to more comprehensive resources or consult with industry professionals to ensure you have all necessary information for effective caregiver training.

# AREAS TO CONSIDER

1. Get More Referrals
2. Build Facebook Ads
3. Invest in Your Caregivers
4. Keys to Social Proof
5. Community Outreach
6. Make the Day-to-Day More Simple
7. Increase Cashflow

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INCREASE CASHFLOW

GEOH

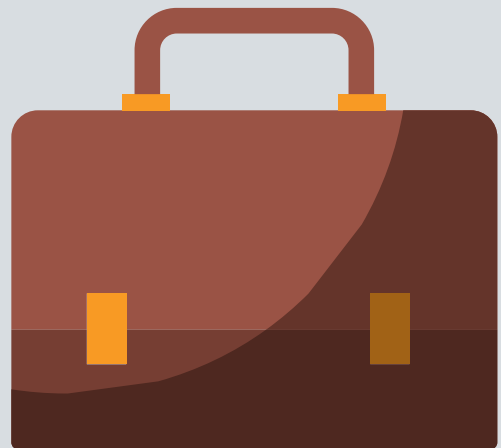
# 1

CHAPTER

GET MORE  
REFERRALS

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**The Number one way to grow your agency referrals is through your case manager!**



**So how do you become top of mind for them?**

# THE ANSWER ...

## **Text and email often with updates!**

1. Send out a weekly email on each client to your case manager.

2. Use the notes feature to update your case manager on every client

(e.g. Is anyone sick? Did anyone fall? Is everyone doing well?)







# 2

CHAPTER

## BUILD FACEBOOK ADS

GEOH.APP

# FACEBOOK ADS

**A great way to find new clients needing care!**

**You can target people by their interests, age, job, and much more!**

**HINT: Start by creating a Facebook business profile!**



# STEP #1

1 Navigate to [facebookads](https://facebookads)

# STEP #2

2 Click "Meta Ads Manager | Facebook ads best practices"

## Create an Ad

Launch a self-service ad in minutes Try sponsored content or text ads.

### Sponsored



Reddit

<https://www.redditforbusiness.com>

## Advertise on Reddit | Reach over 100K communities

With Reddit **ads** you can reach an audience you can't find on other **advertising** platforms.

### Sponsored



Facebook

<https://www.facebook.com>

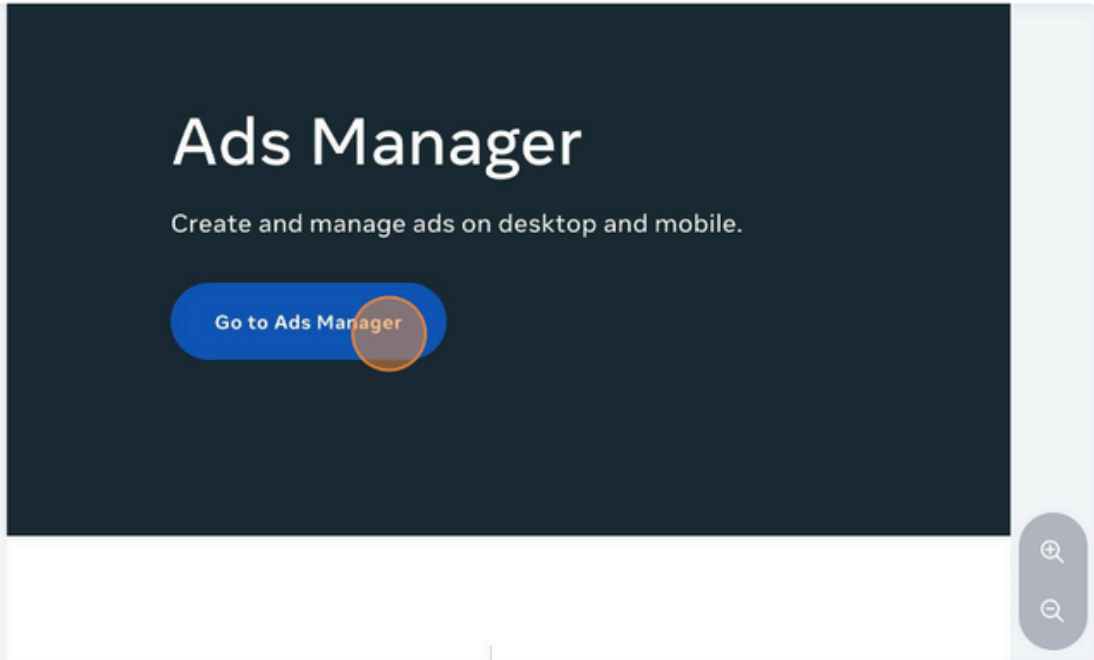
## [Meta Ads Manager | Facebook ads best practices](#)

Considering **advertising** on **Facebook**? There are **ad** solutions for every level of expertise.



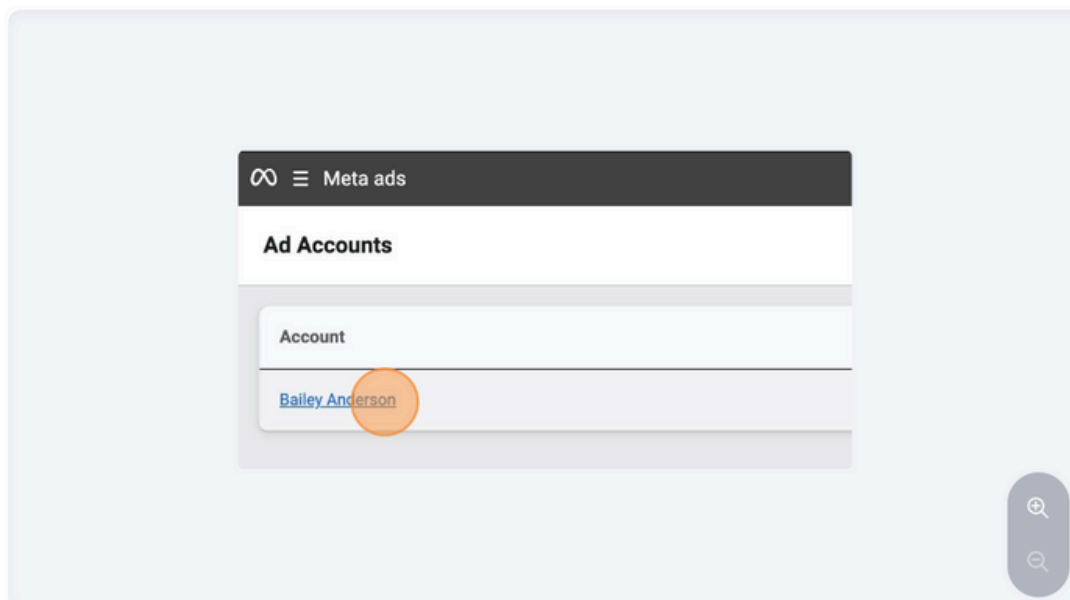
# STEP #3

3 Click "Go to Ads Manager"



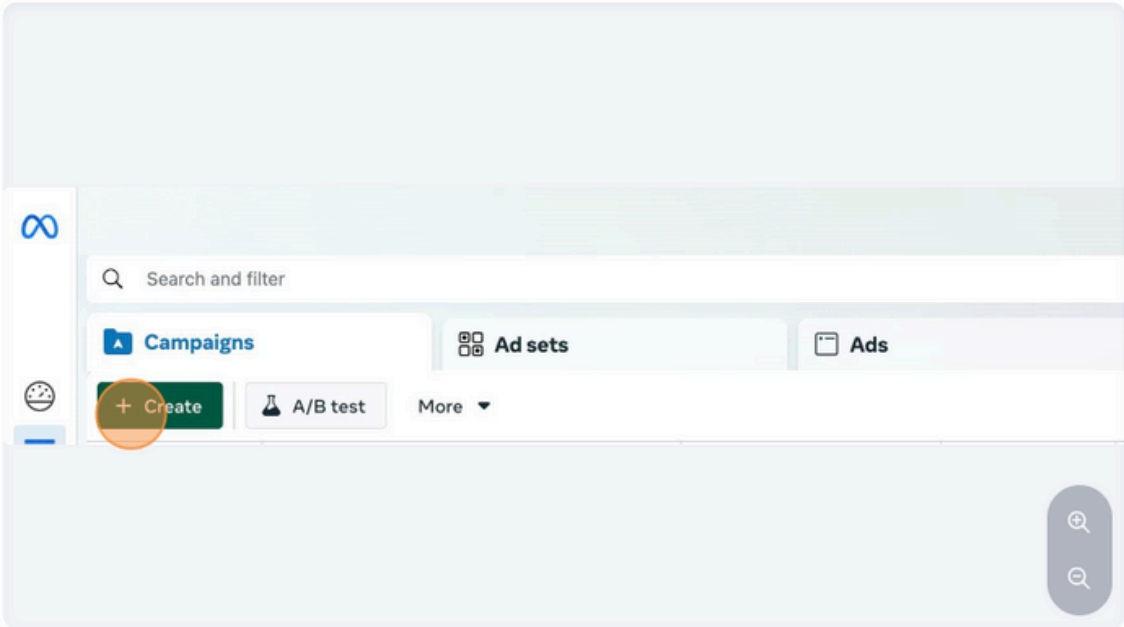
# STEP #4

4 Click "on your account name"



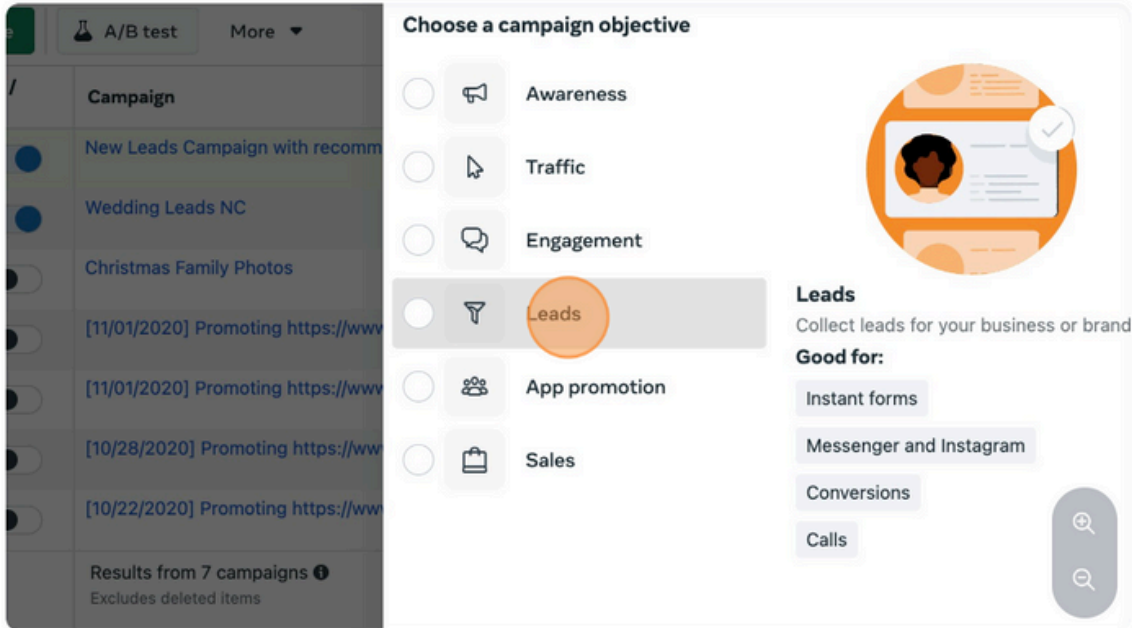
# STEP #5

5 Click here.



# STEP #6

Click "Leads" to set to leads! That is what we want. Whether it is for new clients or finding new caregivers.



# STEP #7

## 8 Click recommended settings

**Choose a campaign setup**

Create your leads campaign using a recommended setup to maximize performance, or manually build your campaign. Suggestions may vary based on your recent ad account activity.

**Streamlined** **Best practices**

**Recommended settings**  
Use preset campaign optimizations to help meet your goals. Preset settings include Advantage+ audience, Advantage+ placements and more.

**Manual setup**

**Manual leads campaign**  
Create a leads campaign from scratch using the standard setup.

Back Continue

# STEP #8

## Add in a campaign name, do not worry about the rest.

**Campaign name**

New Leads Campaign with recommended settings Create template

**Special ad categories**  
Declare if your ads are related to credit, employment or housing, or about social issues, elections or politics. Requirements differ by country. [Learn more](#)

**Categories**  
Select the categories that best describe what this campaign will advertise.

No categories declared

**A/B test** Create A/B test

To help improve ad performance, test versions with different images, text, audiences or placements. For accuracy, each one will be shown to separate groups of your audience.

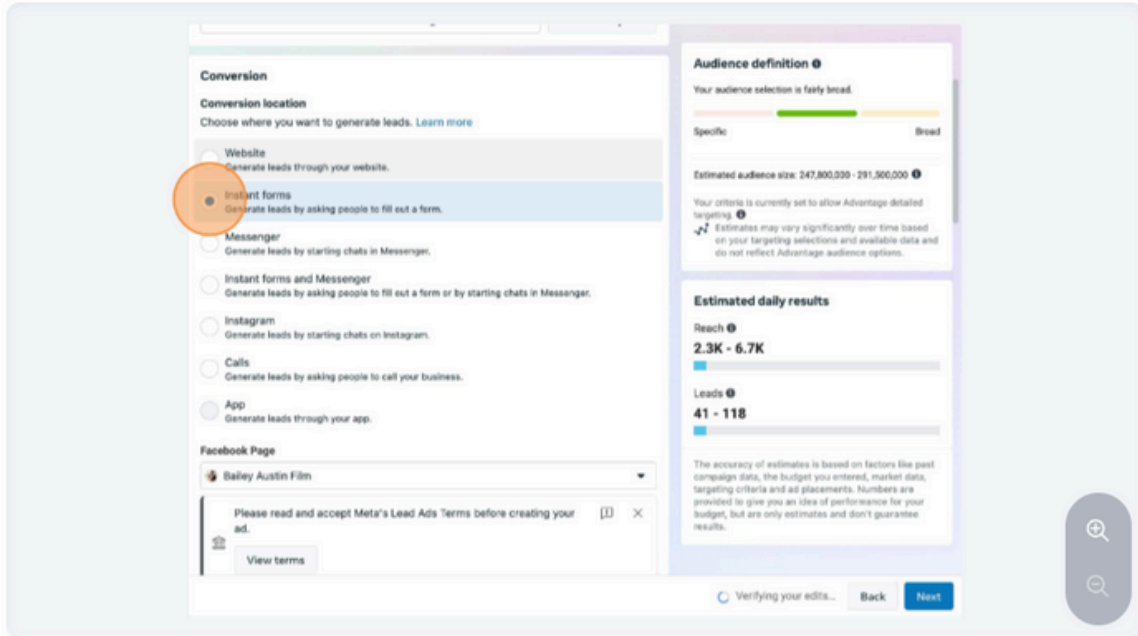
**Advantage campaign budget +** Off

Advantage campaign budget will distribute your budget across currently delivering ad sets to get more results depending on your performance goal choices and bid strategy. You can control spending on each ad set. [Learn more](#)

# STEP #9

10

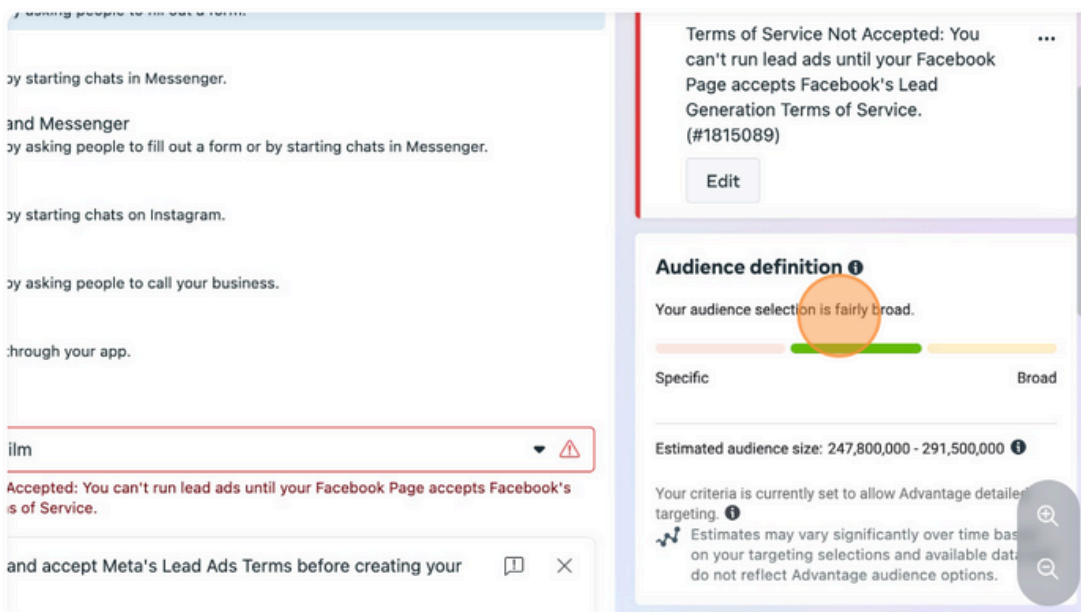
Click either forms or send leads to your website. It is best to collect lead information for quickest conversion



# STEP #10

11

Green is good! "Your audience selection is fairly broad."



# STEP #11

Ensure Your Performance Goal is Set to "Maximize number of leads"

Terms of Service Not Accepted: You can't run lead ads until your Facebook Page accepts Facebook's Lead Generation Terms of Service.

Please read and accept Meta's Lead Ads Terms before creating your ad.

[View terms](#)

**Performance goal**

Maximize number of leads

**Cost per result goal · Optional**

\$X.XX USD

Meta will aim to spend your entire budget and get the most leads using the highest volume bid strategy. If keeping the average cost per result around a certain amount is important, enter a cost per result goal.

Terms of Service Not Accepted: You can't run lead ads until your Facebook Page accepts Facebook's Lead Generation Terms of Service (#1815089)

[Edit](#)

**Audience definition**

Your audience selection is for

Specific

Estimated audience size: 24

Your criteria is currently set to targeting. Estimates may vary on your targeting. Do not reflect actual results.

# STEP #12

Enter the amount you would want to spend as the Cost per result goal.

[View terms](#)

**Performance goal**

Maximize number of leads

**Cost per result goal · Optional**

\$X.XX USD

Meta will aim to spend your entire budget and get the most leads using the highest volume bid strategy. If keeping the average cost per result around a certain amount is important, enter a cost per result goal.

[Show more options](#)

**Budget & schedule**

**Audience definition**

Your audience selection is for

Specific

Estimated audience size:

Your criteria is currently targeting. Estimates may vary on your targeting. Do not reflect actual results.

**Estimated daily**

Reach 2.3K - 6



# STEP #13



Scroll Down to the Budget Section

The screenshot shows the Facebook Ads Manager interface. On the left, there is a sidebar with navigation icons. The main content area is divided into several sections. The 'Budget & schedule' section is highlighted with an orange circle. It includes a 'Budget' field set to '\$20.00' and a 'Schedule' section with a 'Start date' of 'Apr 23, 2024'. To the right, there are sections for 'Verifying your changes', 'Audience definition', and 'Estimated daily results'. The 'Audience definition' section shows an estimated audience size of 247,803,000 - 291,803,000. The 'Estimated daily results' section shows a reach of 2.3K - 6.7K and leads of 44 - 118.

# STEP #14



The max amount you want to spend in a day. (Hint: Keep this lower at first.)

The screenshot shows a close-up of the 'Budget & schedule' section in Facebook Ads Manager. The 'Bid strategy' is set to 'Cost per result goal'. The 'Budget' section is highlighted with an orange circle, showing a 'Daily budget' of '\$20.00' in USD. Below the budget field, there is a note: 'You'll spend an average of \$20 per day. Your maximum daily spend is \$25 and your maximum weekly spend is \$140. Learn more'. The 'Schedule' section shows a 'Start date' of 'Apr 23, 2024' at '03:13 PM PDT'. There is an option to 'Set an end date' which is currently unchecked.

# STEP #15

16 Click the "Date picker" field.

**Budget & schedule**

**Budget**

Daily budget ▼ \$5.00

You'll spend an average of \$5 per day. Your maximum daily spend is \$6.25 and your maximum weekly spend is \$35. [Learn more](#)

**Schedule**

**Start date**

📅 Apr 23, 2024 ⌚ 03:13 PM PDT

**End date**

Set an end date

[Hide options](#)

**Budget scheduling**

📌 Budget scheduling

# STEP #16

Select the Time and Date When You Want These Ads to Start Running

You'll spend an average of \$5 per day. Your maximum daily spend is \$6.25 and your maximum weekly spend is \$35. [Learn more](#)

**Schedule**

**Start date**

📅 4/23/2024 ⌚ 03:13 PM PDT

< April 2024 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

# STEP #17

18

Click "Edit" Next to Ad Scheduling

The screenshot shows the Facebook Ads Manager interface. On the left, there are three menu items: 'Recommend...', 'Compare...', and 'Compare...'. The main content area is divided into several sections:

- Budget scheduling**: Contains a 'Budget scheduling' section with a star icon and a 'Try budget scheduling' button. Below it is a checkbox labeled 'Increase your budget during specific time periods' with a 'View' dropdown.
- Ad scheduling**: Shows 'Run ads all the time' with an orange circle highlighting an 'Edit' button.
- Audience controls**: Includes a 'Locations' section with 'United States' listed and a 'Show more options' link.
- Verifying your changes**: A warning box stating 'Terms of Service Not Accepted: You can't run lead ads until your Facebook Page accepts Facebook's Lead Generation Terms of Service. (#1815089)' with an 'Edit' button.
- Audience definition**: Shows 'Your audience selection is fairly broad.' with a progress bar between 'Specific' and 'Broad'. It also displays 'Estimated audience size: 247,800,000 - 291,500,000' and a note about targeting criteria.
- Estimated daily results**: Shows 'The budget you entered limits the number of results you're likely to get.' with a 'Learn more' link.

# STEP #18

19

Change it to "Increase your budget during specific time periods".

The screenshot shows the Facebook Ads Manager interface, focusing on the 'Budget scheduling' section. The 'Ad scheduling' section is now set to 'Run ads all the time'. An orange circle highlights the checkbox labeled 'Increase your budget during specific time periods'.

The 'Audience controls' section remains the same, showing 'United States' as the location. The 'Verifying your changes' and 'Audience definition' sections are also visible, along with the 'Estimated daily results' section.

# STEP #19

20

Select the Time and Date When You Want These Ads to Stop Running

Additional time periods.

budget scheduling

Use your budget during specific time periods

View

Duration of your anticipated high demand period

Ends

Apr 28, 2024 03:13 PM - Apr 29, 2024 12:00 AM

Daily budget by value amount (\$) \$ 5.00 USD

I want to spend an average of \$10 a day (a \$5 increase) from Apr 28 to Apr 29.

Move this period

Another time period

1/50 entries

Specific

Broad

Estimated audience size: 247,800,000 - 291,500,000

Your criteria is currently set to allow Advantage detailed targeting.

Estimates may vary significantly over time based on your targeting selections and available data and do not reflect Advantage audience options.

Estimated daily results

The budget you entered limits the number of results you're likely to get. [Learn more](#)

Reach

581 - 1.7K

Leads

10 - 30

# STEP #20



Click the "00" field.

Additional time periods.

budget scheduling

Use your budget during specific time periods

View

Duration of your anticipated high demand period

Ends

Apr 28, 2024 03:13 PM - Apr 29, 2024 12:00 AM

Daily budget by value amount (\$) \$ 5.00 USD

I want to spend an average of \$10 a day (a \$5 increase) from Apr 28 to Apr 29.

Move this period

Another time period

1/50 entries

45). (#3858205)

Audience definition

Your audience selection is fairly broad.

Specific

Broad

Estimated audience size: 247,800,000 - 291,500,000

Your criteria is currently set to allow Advantage detailed targeting.

Estimates may vary significantly over time based on your targeting selections and available data and do not reflect Advantage audience options.

Estimated daily results

The budget you entered limits the number of results you're likely to get. [Learn more](#)

Reach

# STEP #21



Click "Audience suggestion (optional)"

**Locations** ⓘ

Location:

**Audience suggestions**

Criteria you add here helps our system understand the type of people you want to reach. When your suggestion is accurate it can help find your audience faster. If you're not confident about the audience for this campaign we recommend not adding an audience suggestion. [Learn more about audience suggestions.](#)

+ Audience suggestion (optional)

**Placements** ⚡

This ad set is using Advantage placements. Your ads are shown in more places to increase the number of people who can see your ad and to help get more results. [Learn more](#)

Estimated audience size: 58

Reach: 58

Leads: 10

# STEP #22



Click "Edit" next to the Detailed targeting Field

Show more options ▾

**Advantage+ audience** ⚡

Our ad technology automatically finds your audience. If you share an audience suggestion, we'll prioritize audiences matching this profile before searching more widely. [Learn more](#)

**Custom audiences** ⓘ Create new ▾

Q Search existing audiences

**Age** ⓘ

18 - 65+

**Gender** ⓘ

All genders

**Detailed targeting**

All demographics, interests and behaviors **Edit**

**Placements** ⚡

This ad set is using Advantage placements. Your ads are shown in more places to increase the number of people who can see your ad and to help get more results. [Learn more](#)

Show more options ▾

Estimated audience size: 247,800,000 - 291,500,000 ⓘ

Your criteria is currently set to allow Advantage detailed targeting. ⓘ

Estimates may vary significantly over time based on your targeting selections and available data and

Now you can quickly create a lookalike audience to use during ad set creation. Choose lookalike audience from the menu to get started. [Learn more.](#)

The budget you entered limits the number of results you're likely to get. [Learn more](#)

**Reach** ⓘ

581 - 1.7K


**Leads** ⓘ

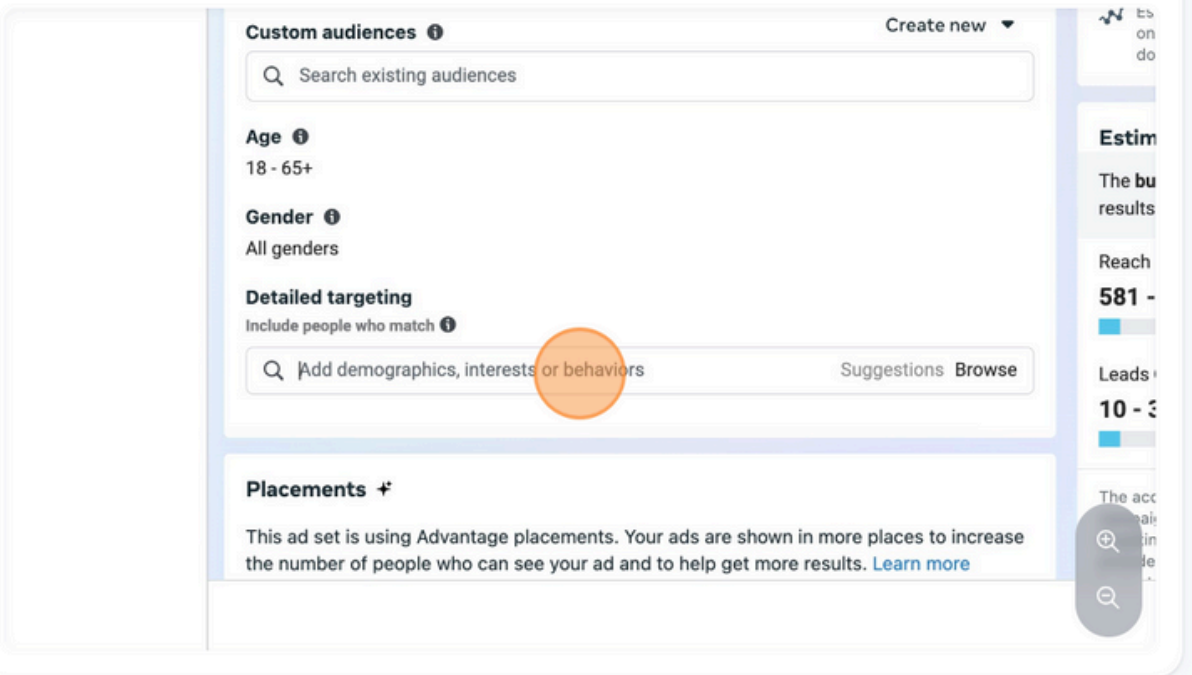
10 - 30

The accuracy of estimates is based on factors like past campaign data, the budget you entered, market targeting criteria and ad placements. Numbers provided to give you an idea of performance for budget, but are only estimates and don't guarantee results.

✓ All edits saved Back

# STEP #23

Step  Enter relevant criteria into the "Add demographics, interests or behaviors" field.




The screenshot shows the Facebook Ads targeting interface. It includes sections for Custom audiences, Age (18-65+), Gender (All genders), and Detailed targeting. The Detailed targeting section has a search field with the placeholder text "Add demographics, interests or behaviors", which is highlighted with an orange circle. To the right of the search field are "Suggestions" and "Browse" buttons. Below this is the Placements section, which states that the ad set uses Advantage placements. On the far right, a vertical sidebar displays performance metrics: "Estim", "The bu results", "Reach 581 -", and "Leads 10 - 3".

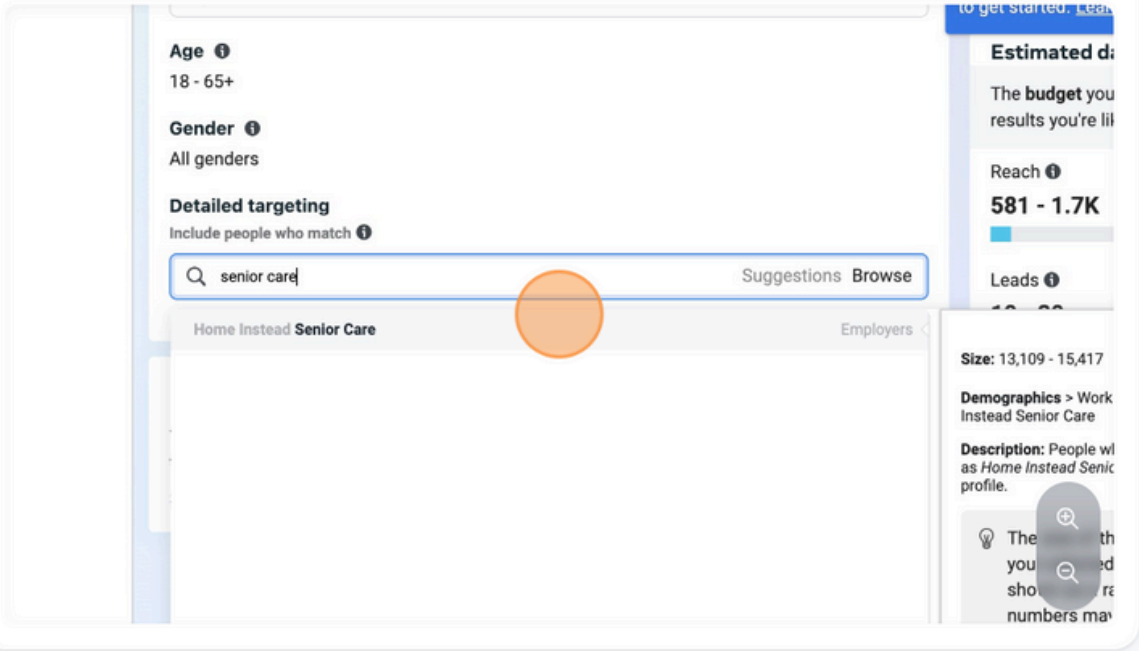
# STEP #24

25 For example: "senior care"



# STEP #25

 Click here.

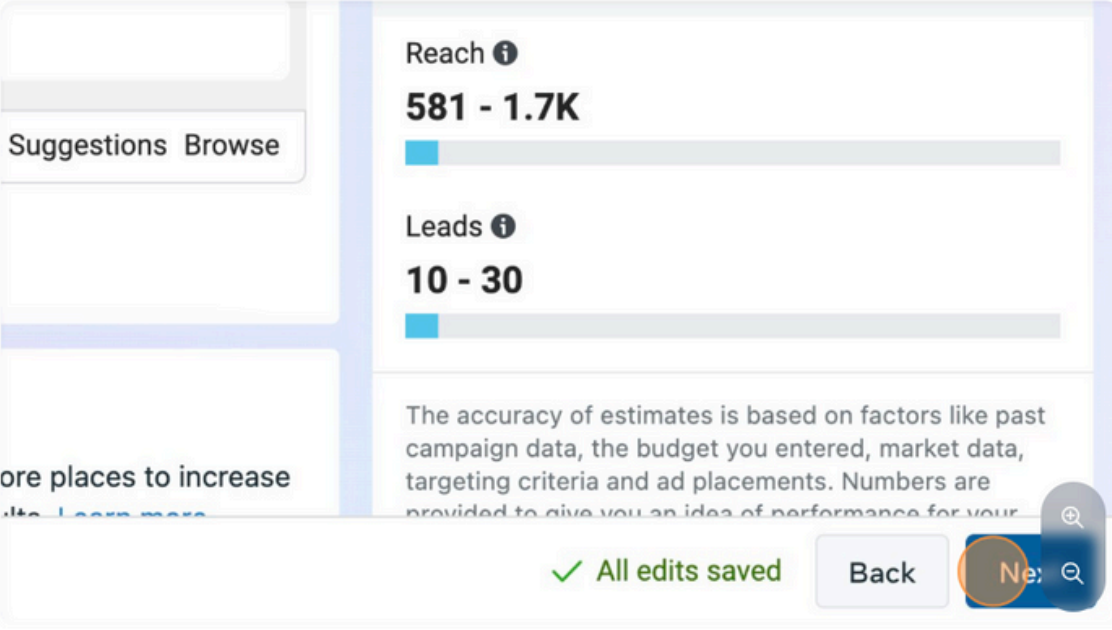


The screenshot shows the Facebook targeting interface. On the left, there are filters for Age (18 - 65+), Gender (All genders), and Detailed targeting (Include people who match). A search bar contains the text "senior care" and has an orange circle around it. Below the search bar, there are suggestions for "Home Instead Senior Care" and "Employers". On the right, there is a summary panel with the following information:

- Estimated d: [partially obscured]
- The budget you results you're lili [partially obscured]
- Reach **581 - 1.7K**
- Leads **10 - 30**
- Size: 13,109 - 15,417
- Demographics > Work Instead Senior Care
- Description: People w as Home Instead Senic profile.

# STEP #26

- 27** Once you're finished adding all this criteria, click "Next" and the ads should finalize.



The screenshot shows the Facebook targeting interface with performance estimates. On the left, there is a search bar with "senior care" and a "Suggestions Browse" button. On the right, there is a summary panel with the following information:

- Reach **581 - 1.7K**
- Leads **10 - 30**

Below the summary panel, there is a note: "The accuracy of estimates is based on factors like past campaign data, the budget you entered, market data, targeting criteria and ad placements. Numbers are provided to give you an idea of performance for your..."

At the bottom, there is a green checkmark icon and the text "All edits saved", a "Back" button, and a "Next" button with a magnifying glass icon.

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# 3

CHAPTER

**INVEST IN YOUR  
CAREGIVERS**

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# WHY INVEST?

**Caregivers are on the Front  
Lines**

**They are your agency  
representatives and first  
point of contact!**



# WHY INVEST?

**Bad News Travels Fast (e.g. late arrival, poor care, etc.)**

**Helping them Succeed Helps the Agency Succeed**



# HOW TO INVEST

**Offer Training Access (e.g. seminars, certifications, online courses)**

**Example: Activated Insights, Caregiver Academy etc.**



# HOW TO INVEST

**Flexible Scheduling: Let your caregivers choose their hours!**

**Example: Make their schedule and let them approve it two weeks in advance!**



# HOW TO INVEST

**Incorporate a Rewards Program:  
Encourage performance at work**

**Example: Give gift cards for  
employee of the week with  
written guidelines on things like  
checking-in three times a week.**



# HOW TO INVEST

**Collect and Apply Feedback (e.g. surveys)**

**Think about making an employee survey**

**Ask questions about what employees like and don't like at your agency**

**Example: On a scale of 1-10 how supported do you feel by your admin.**



# HOW TO INVEST

**GOAL: Create an agency culture that the caregiver would be excited to join!**



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# 4

CHAPTER

## KEYS TO SOCIAL PROOF

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# PURPOSE:

**Social Proof (e.g. Facebook Ads, Testimonials, Certifications)**

## **3 Keys to Developing Good Social Proof**

1. Set a social proof goal
2. Find customers that are happy with you!
3. Set a reward for them if possible for completing their review (Example: gift cards for their time)

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# 5

CHAPTER

## COMMUNITY OUTREACH

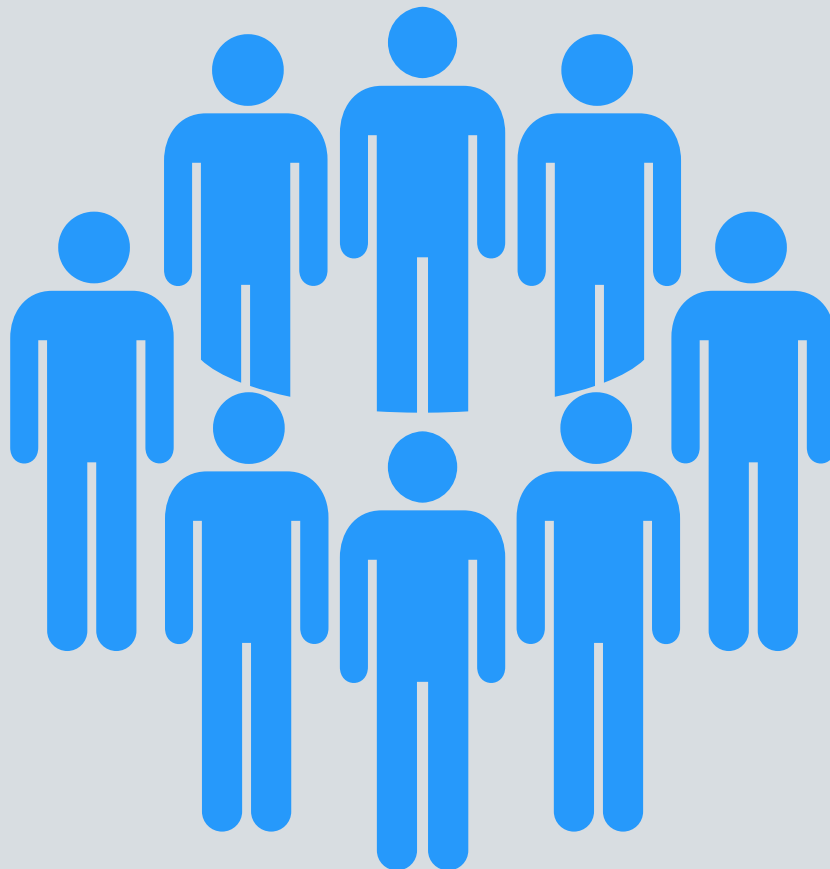
GEOH.APP

# COMMUNITY OUTREACH OPPORTUNITIES

**Volunteer Opportunities  
(Example: at a senior home)**

**Event Gatherings  
(Example: at conferences)**

**Collection Drives  
(Example, clothes, toiletries,  
furniture)**





# 6

CHAPTER

**MAKE THE DAY-TO-  
DAY MORE SIMPLE**

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# **DAILY RESPONSIBILITIES**

- **Scheduling**
  - **Checking Visit Data**
  - **Tracking Attendance**
  - **Logging Incidents**
  - **Recording Absences**
- 
- **Adding Notes**
  - **Communicate with Caregivers**
  - **Submitting Claims**
  - **Staying Up-to-Date on Industry Developments**

# SOLUTION



- **State of the Art Software**
- **Designed to Save You Time and Money**
- **Help you get time back to focus on growing more business!**



# 7

CHAPTER

# INCREASE CASHFLOW

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# INCREASE CASHFLOW

Use a Cashflow Forecast to  
measure your Income and  
Expenses

Reduce Expenses

Increase Income

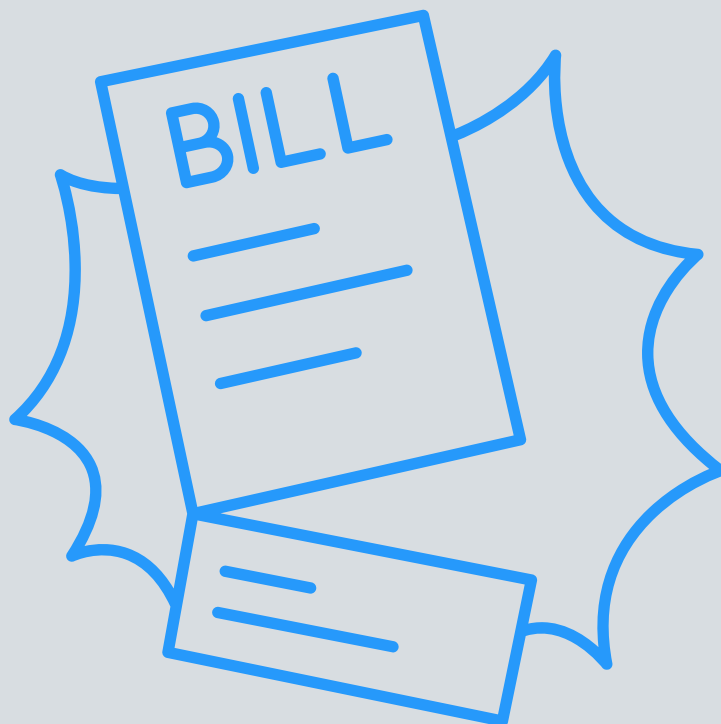




# WHAT ARE EXPENSES?

**Expenses: any person, place, or thing attributed to an agency that costs money**

- **Rent, Utilities, Insurance**
- **Office/Medical Supplies**
- **Marketing & Advertising**
- **Wages, Benefits, Background Checks**
- **Administrative Costs**



# WHAT IS INCOME?

**Income: any person, place, or thing attributed to an agency that generates money**

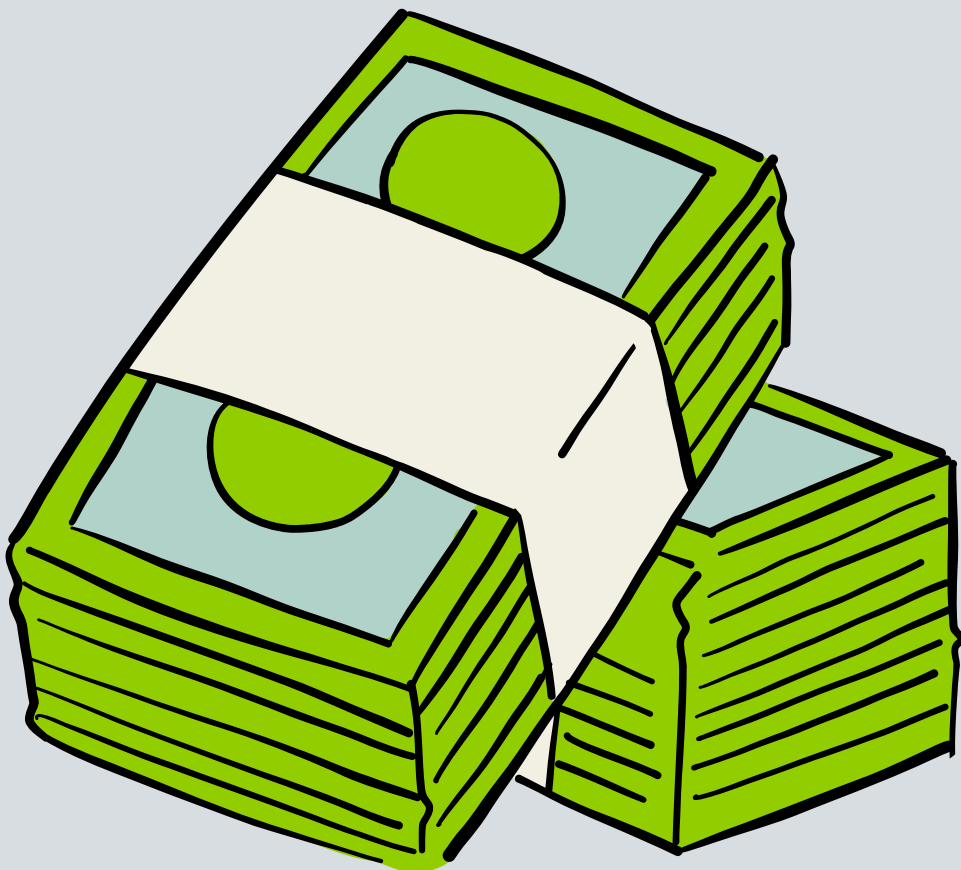
- **Medicare/Medicaid Services**
- **Private Pay Services**



# BEST WAY TO INCREASE INCOME?

**Control what you can control!**

- **Minimize the # of Denied Claims**
- **Maximize Return on Claim Submissions**



We hope you find these tips  
and printables helpful for  
running your agency! We have  
hope that great things are in  
store for your agency, and if  
you ever need help remember  
we here at GEOH are here for  
you!

- The GEOH team



**"There is nothing impossible  
to they who will try.**

Alexander the Great



# YOU CAN DO THIS!

Questions? Ask us here: (317) 455-3218

Q U E S T I O N S ?

[GEOH.APP](https://www.geoh.app)