



## Monday Morning Marketing Meeting

Month of June 2015

Topic: *"Benchmarks & Best Practices"*

The **Monday Morning Marketing Meeting** is a monthly packet of information that you can use to engage your office staff and sales team in making your phone ring, converting callers to clients, and generating more WOMM – Word-of-Mouth Marketing.

As a **Premium Member** of **The Academy for Private Duty Home Care®**, you are receiving this packet

- **Agendas for four weekly marketing meetings**
  - Week 1 – Benchmarking conversion ratios
  - Week 2 – Benchmarking competitive advantage
  - Week 3 – Benchmarking sales & marketing
  - Week 4 – Benchmarking recruiting & retention
- **Links to four videos** – 10 - 12 minutes in length
  - Video 1 – **Benchmarking conversion ratios**  
<https://youtu.be/T3rEXIeRjPY>
  - Video 2 – **Benchmarking competitive advantage**  
<https://youtu.be/bmncGdOB5J8>
  - Video 3 – **Benchmarking sales & marketing**  
<https://youtu.be/XpXYa40P8So>
  - Video 4 – **Benchmarking recruiting & retention**  
<https://youtu.be/T6GteLXHrzl>
- **Discussion questions**
- **Invitation to "Ask Stephen Tweed" live web conference**  
Email to [Questions@leadinghomecare.com](mailto:Questions@leadinghomecare.com)

[www.privatedutyacademy.org](http://www.privatedutyacademy.org) for time and date of live web conference

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## Week 1 Marketing Meeting Agenda

### "Benchmarking Conversion Ratios"

Date:

Time:

#### Weekly Performance Review:

- How many inquiry calls this week?
- How many in-home assessments scheduled?
- How many new clients admitted?
- How many billable hours?
- Average hours per client.

**Goal Achievement:** what have we done this week to implement our Competitive Strategy Goals and Action steps?

- Goal 1:
- Goal 2
- Goal 3:

**Learning Topic:** *Grow your Word of Mouth marketing*

**Video:** "Benchmarking & Best Practices – Conversion ratios"

<https://youtu.be/T3rEXIeRjPY>

#### Discussion Questions:

1. What can we do to improve our conversion ratio from Inquiries to Assessments?
2. What can we do to improve our conversion of Assessments to Admissions?

Preparation for Next Meeting:

Next Meeting Date:

Time:



**Week 2 Marketing Meeting Agenda**  
**Benchmarking Competitive Advantage**

Date:

Time:

**Weekly Performance Review:**

- How many inquiry calls this week?
- How many in-home assessments scheduled?
- How many new clients admitted?
- How many billable hours?
- Average hours per client.

**Goal Achievement:** what have we done this week to implement our Competitive Strategy Goals and Action steps?

- 1.
- 2.
- 3.

**Learning Topic: Creating Exceptional Customer Experiences**

**Video:** <https://youtu.be/bmncGdOB5J8>

**Discussion Questions:**

1. How are we doing on our Competitive Advantage Goals?
2. What can we do to be more competitive in our local marketplace?

**Preparation for Next Meeting:**

Next Meeting – Date:                      Time:



### **Week 3 Marketing Meeting Agenda**

#### **Benchmarking Sales & Marketing**

Date:

Time:

#### **Weekly Performance Review:**

- How many inquiry calls this week?
- How many in-home assessments scheduled?
- How many new clients admitted?
- How many billable hours?
- Average hours per client.

**Goal Achievement:** what have we done this week to implement our Competitive Strategy Goals and Action steps?

- 1.
- 2.
- 3.

**Learning Topic:** Benchmarking sales & marketing

**Video:** <https://youtu.be/XpXYa40P8So>

#### **Discussion Questions:**

1. What new marketing methods could we use to grow our business?
2. What do we need to do to try those new methods?

#### **Preparation for Next Meeting:**

Next Meeting – Date:

Time:



**Week 4 Marketing Meeting Agenda**  
**Benchmarking Recruiting & Retention**

Date:

Time:

**Weekly Performance Review:**

- How many inquiry calls this week?
- How many in-home assessments scheduled?
- How many new clients admitted?
- How many billable hours?
- Average hours per client.

**Goal Achievement:** what have we done this week to implement our Competitive Strategy Goals and Action steps?

- 1.
- 2.
- 3.

**Learning Topic: Benchmarking Recruiting and Retention**

**Video:** <https://youtu.be/T6GtelXHzi>

**Discussion Questions**

1. What can we do to improve our caregiver recruiting?
2. What can we do to improve our caregiver retention?

**Questions for Stephen Tweed:**

**Email to [questions@leadinghomecare.com](mailto:questions@leadinghomecare.com)**

**Preparation for Next Meeting:**

Next Meeting – Date:

Time: