

**Customer Relationship Management (CRM) for Senior Home Care Agencies - How to Turn Every Caller Into a Client and Referral Source for Life**  
**Julie Northcutt, CEO, Caregiverlist**  
**Webinar - Thursday, August 12, 2010 - Noon Eastern**



Learn how top agencies respond to client requests for services and build a customer and referral source for life with customer relationship management. Review a CRM system and see responses to client requests for services from other agencies. Most hospitals and nursing homes require discharge planners and social workers to provide at least 3 agencies as referrals. Review Caregiverlist's survey on why seniors and their families chose their agency over others.

Topics to be covered in the webinar:

- Messaging: writing the script that tells your company's service story
- Client Lead Form: capturing the right information in the initial conversation
- Follow-up
- Tracking
- Resource Library
- Net Revenue by Referral Source
- Winning Client Response E-mails (real e-mails sent by agencies, names kept confidential)
- Generic Client Response E-mails (real e-mails sent by agencies, names kept confidential)
- Questions to ask potential clients to engage them

To register, please fax this form to the NPDA office at 317-663-3640. Cost is \$49 for members, and \$125 for non-members. [Registration is limited to the FIRST 45 attendees.](#)

Name: \_\_\_\_\_  Member  Non-member

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

email: \_\_\_\_\_

Method of Payment: Visa \_\_\_\_\_ Master Card \_\_\_\_\_ Check \_\_\_\_\_

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Yes, I want to redeem my complimentary one-time teleconference registration for 2010

**Payment must be received by August 9, 2010**

Registrations are **not** accepted without payment.

Cancellations are subject to \$25 processing fee

Confirmations, dial-in instructions, and handouts will be emailed two-days **prior** to the session. The webinar dial-in phone number is not a toll free call. The webinar will last approximately 1.5 hours.

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**phone 317-663-3637 fax 317-663-3640 [www.privatedutyhomecare.org](http://www.privatedutyhomecare.org)**