

**LifeSync**

***The Art  
of Referral  
Partnerships***  
*Build. Sustain. Grow.*

6<sup>th</sup> Annual National  
Home Care Cooperative Conference

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# The Art of Referral Partnerships

**Brand + Product/Service + User Experience = Value**

The *Art* is to distinguish your value from others

A referral is when someone in your network recommends your business to a new prospect because of **value**. Referrals can be organic from personal experience or word-of-mouth (WOM) and/or inorganic from marketing efforts.



**"I want people to be  
overwhelmed with light  
and color in some way  
that they've never  
experienced."  
—CHIHULY**



# Discussion Topics

- Market Insight
- Target Market
- Differentiation – Value Proposition
  - Brainstorming
- Building Referral Relationships
  - Brainstorming
- Best Practices
  - Build, Sustain and Grow Partnerships
- Q&A







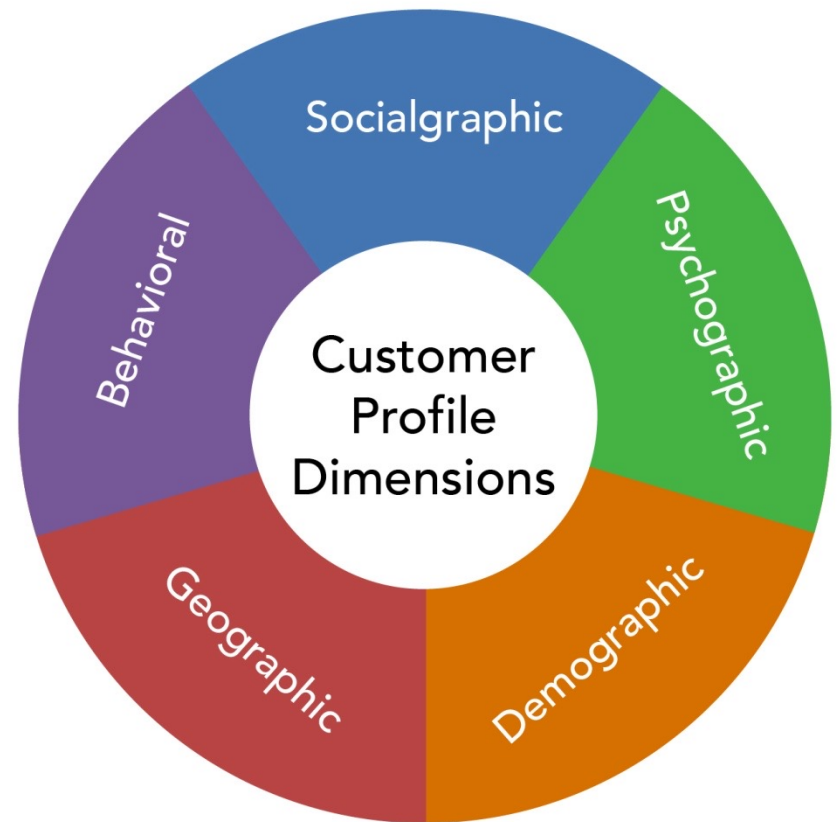
# Market Insights

- Assessment
- Supply and demand
- Existing services
- Unmet needs
- Social determinants
- Service Networks



# Target Market

- Service Area Map(s)
- Zip Codes
- Living Communities
- Neighborhoods
- Demographics
- Needs (SDoH)
- Access
- Resources / Funds







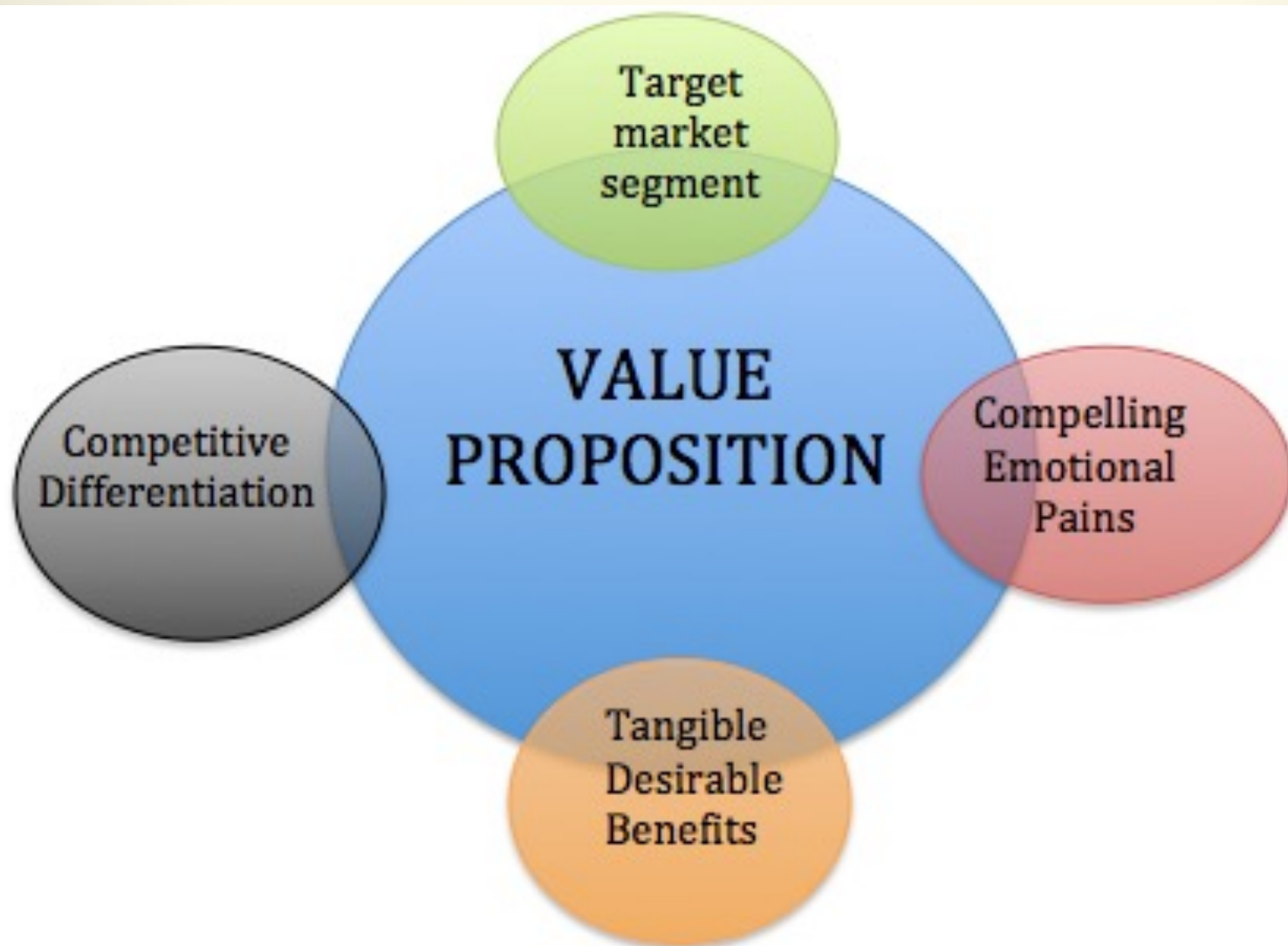


# Value-Proposition

- Mission/Vision and Services
- Features, Benefits, *Unique* Selling Points
  - Key Differentiators
- Knowing the value
- Value pitch (practiced)

**“Nowadays people know the price of everything and the value of nothing.”**

— Oscar Wilde







Our  
help(s)



Products and Services



Customer Segment

who want to



Jobs to be done

by

verb (e.g. reducing, avoiding)



and a customer pain

and

verb (e.g. increasng, enabling)



and a customer gain

(unlike



competing value proposition

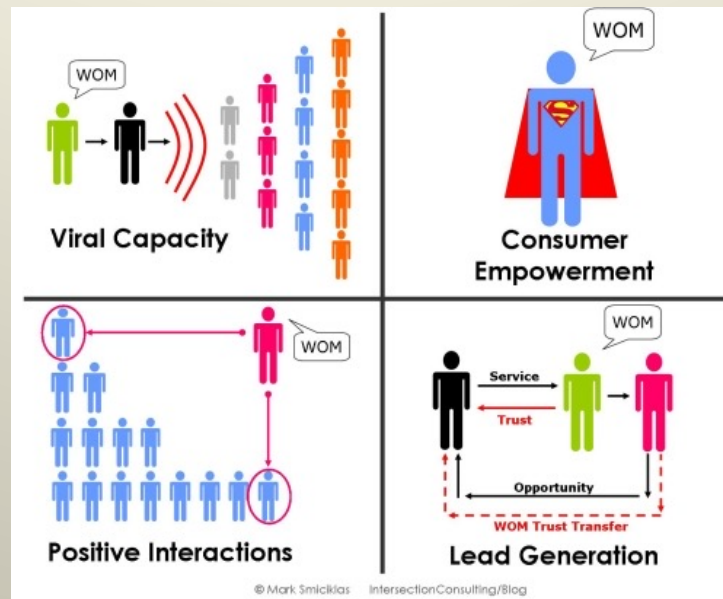
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# Primary Referral Sources

- Direct marketing (e.g., mailings, promotions)
  - Family/Friends/Clients (existing co-op/agencies)
  - Partner organizations (new and existing)
- Networks



Building Referral Partnerships: A Quick Start Guide. [www.cdf.coop/resources](http://www.cdf.coop/resources)

[www.homecarepulse.com/resource-library/home-care-referral-marketing-strategy-guide/](http://www.homecarepulse.com/resource-library/home-care-referral-marketing-strategy-guide/)

# Example Network Referral Sources

- Local Agencies on Aging
- Care Management Organizations
- Online Care Finder Services – Get Listed
- Hospital discharge planners, Social Workers
- Assisted and Independent Living communities
- Recreation and/or Senior Centers (e.g., YMCA)
- Neighborhoods, Housing Complexes
- Licensed Practitioners, Physicians/Geriatricians
- Community Service Orgs. and Congregations
- Professional organizations and newsletters

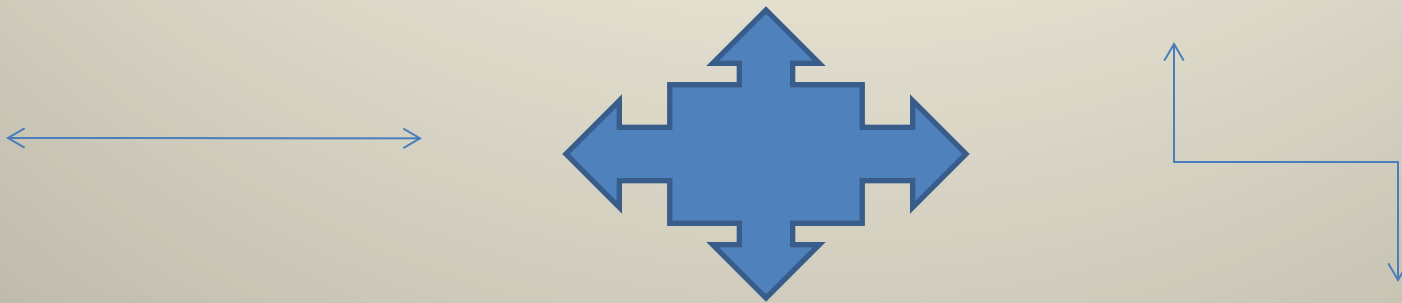


# Referral Sources and Lead Generation

- **Identify at least 3 people or organizations by name and contact information for outreach**
- Learn about their services – 1<sup>st</sup> step
- What does your co-op offer that they need?
- Assess current capacity to deliver
- Keep your value-proposition visible
- Foster open communication and feedback
- Ongoing outreach and engagement
- Be efficient and reliable when contacted

# Making Contact

- Identify – who and how to customize
- Approach – outreach and engagement tactics
- Indirect and Direct Relationships
- Straight line isn't always the fastest route





# Building Trust for Partnerships

- Seek to understand
- Listen, learn and respond
- Appeal to needs (know what they are!)
- Build a relationship that is mutually beneficial
- Robust processes
- Reliable delivery for credibility
- Be authentic and generous
- Respect diversity of thought

**Build  
relations  
that are  
diverse  
and  
anchor  
with  
common  
ground.**





# Best Practices

- **Build** outreach and engagement
  - social media presence
  - public recognition (of and for)
  - marketing, LOCAL sponsorships
  - measure satisfaction internal and external
  - use testimonials
- **Sustain** relationship management
  - ongoing outreach and engagement (stay in contact)
  - 2-way street
  - Publically Thank and Honor partners
- **Grow** and leverage value
  - consistently provide superior service delivery
  - be highly collaborative and known for that approach

THANK  
YOU



# Q & A



# Resources

- <https://icagroup.org/homecare/>
- <https://www.cdf.coop/home-care-conference-resources>
- <https://careacademy.com/blog/home-health-care-referrals/>
- <https://careacademy.com/blog/get-clients-home-care-business/>
- <https://www.homecarepulse.com/resource-library/home-care-referral-marketing-strategy-guide/>
- <https://www.homecarepulse.com/articles/referrals-from-hospital-systems/>
- <https://www.forbes.com/sites/forbesbusinesscouncil/2021/07/29/the-art-of-client-referrals-an-entrepreneurs-guide/?sh=474231b54244>