HOMETRAK COMPANION

CRM - CLIENT RELATIONSHIP / REFERRAL MANAGEMENT PROCESS

VERSION 6.3

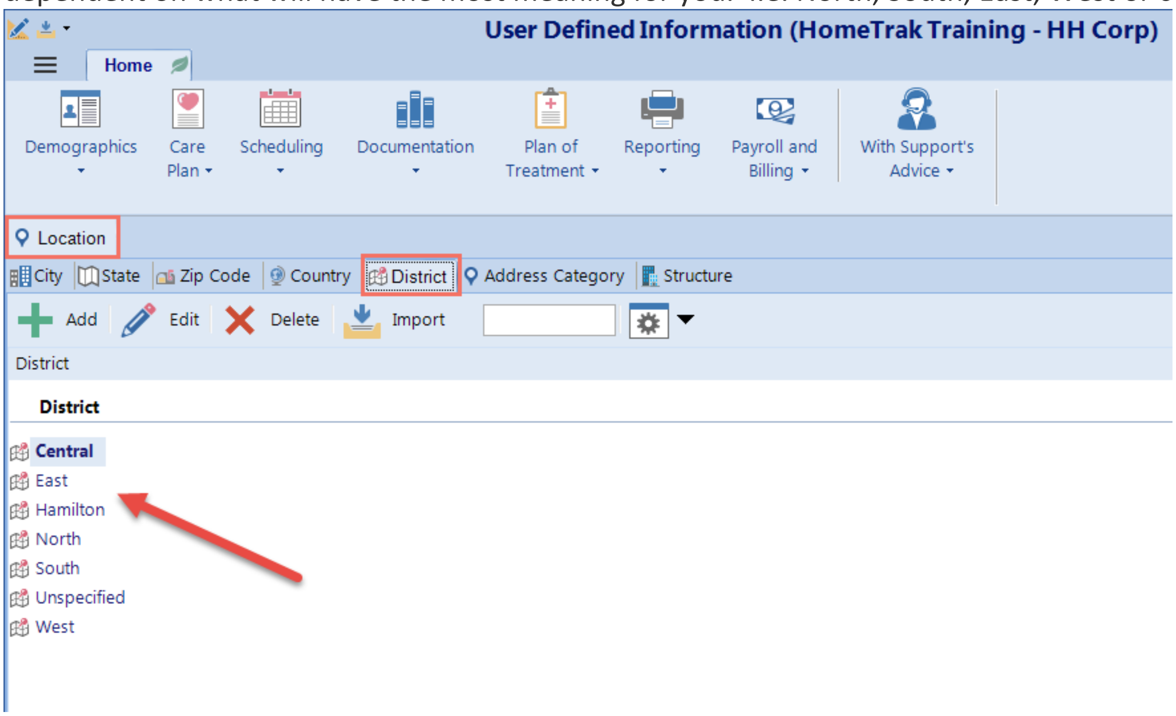
In this document we are going to be outlining how HomeTrak Companion can assist you in developing your referral sources, organize your time and quantify your sources.

In order to make the most out of this process we have some required set up. Most of you will already have these parameters set in your database, but it is a good idea to ensure this is the case. These set up procedures are going to tie directly to reports.

Setup:

1. User Defined> Demographics> Location> Districts

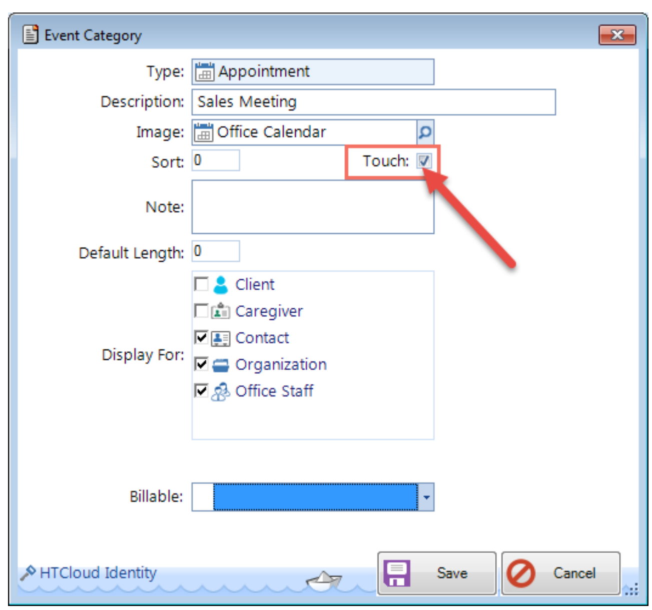
In the User Defined section please make sure that you have defined your districts. How do you define your districts? Districts are used to divide your area of service or catchment so how you choose to do that is dependent on what will have the most meaning for you. I.e. North, South, East, West or counties etc.



2. User Defined> Scheduling> Appointment Categories &

3. User Defined> Scheduling> Task Categories

Ensure that for all of the Appointment and Task categories you consider to be related to tracking for CRM purposes, has the *'Touch'* flag checked.



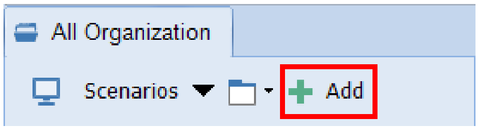
Once you have these features set up, you are now ready to start building your referral Sources through the *Organizations* Tab in the Relationship Module.

At this juncture it is an excellent time to remind you that you can add your Organizations & Contacts from your HomeTrak mobile app as well as from the instructions below, which are demonstrating adding Organizations & Contacts from your desktop version.

How to Add an Organization from Desktop Companion

From **Relationship Module**, select the **Organizations** tab.

Click **Add** on the Scenarios Panel on the left-hand side of the screen.



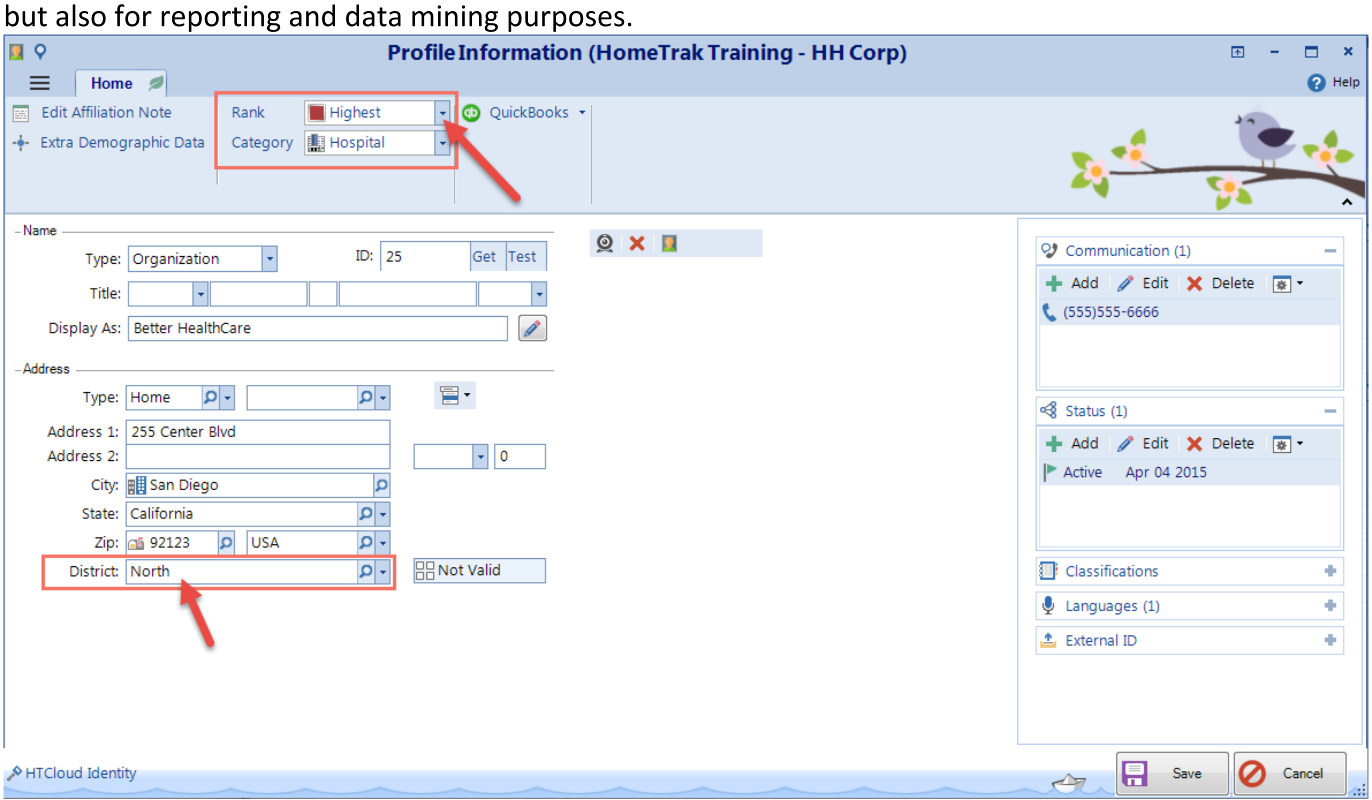
The *'Add New'* screen will appear and you will want to start populating the fields. From the diagram, please make note of the fields to ensure you are selecting the ones highlighted. Take particular note of the *Rank & the Districts.*

Why Rank your organizations?

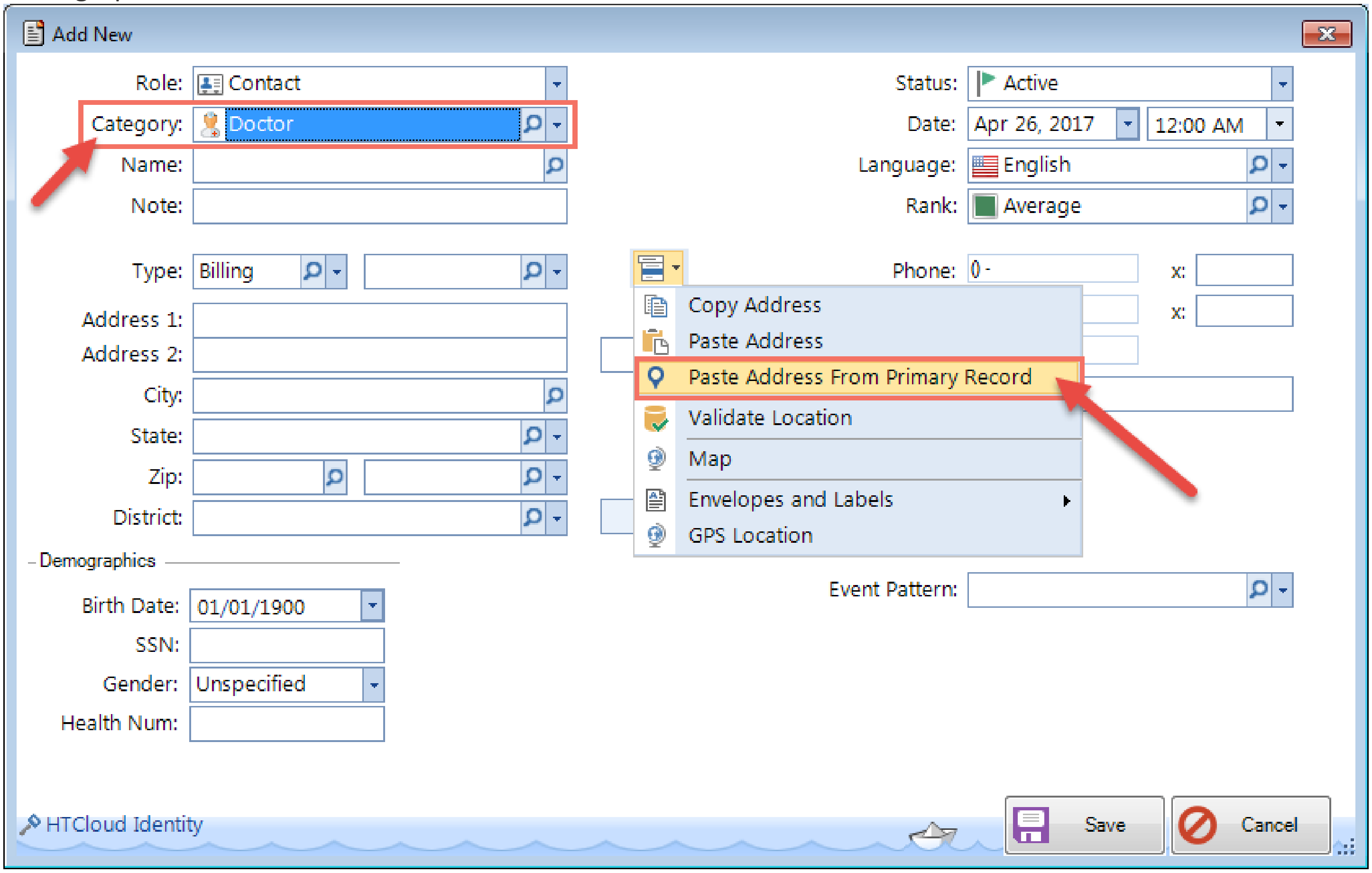
Data suggests that certain types of organizations produce the most benefical referral sources, and we recommend that you use the Ranking feature to manage this. For example, you may want to rank Hospitals & Assisted Living Communities your highest rank, while Religious Organizations you may rank lower. You decide what type of organizations is rank higher than others, but make sure you do rank them, because you are going to use this ranking system when planning your week, and for data mining.

Why use Districts?

By choosing the correct district that the organization resides in is beneficial not only for planning your week, but also for reporting and data mining purposes.

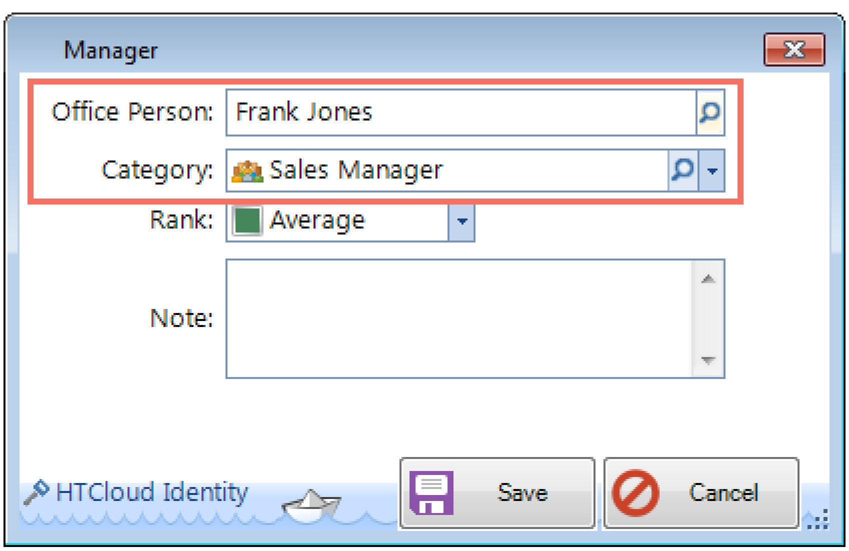


Next you are going to attach the Contacts who have a relationship with this Organization. Simply select ***'Relationships'*** from the *Demographic* menu & from the *Add* drop down, select ***'Contact'***. Most important about this profile screen is their **'Category'**. The category is reflective of their job title or role. If their address is the same as the organization's select: '*Paste Address from Primary Record*' from the menu to populate the demographic information.



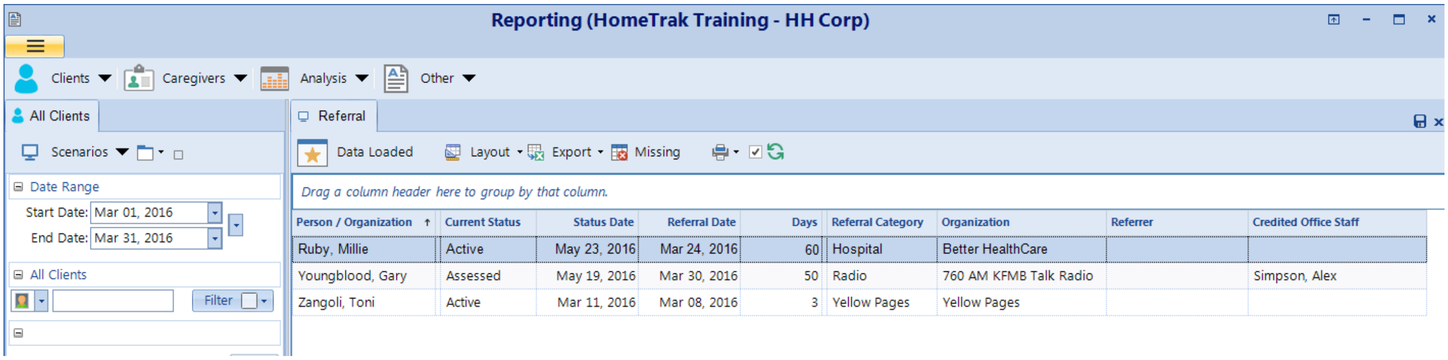
If anyone from your company is responsible for managing this account or organization you have the option of indicating this within the software.

Click **'Add Manager'** from the drop-down list. Next, click the *magnifying glass* icon to choose the Office Staff person's name from the list that appears. Last step is to click the **Save** button.

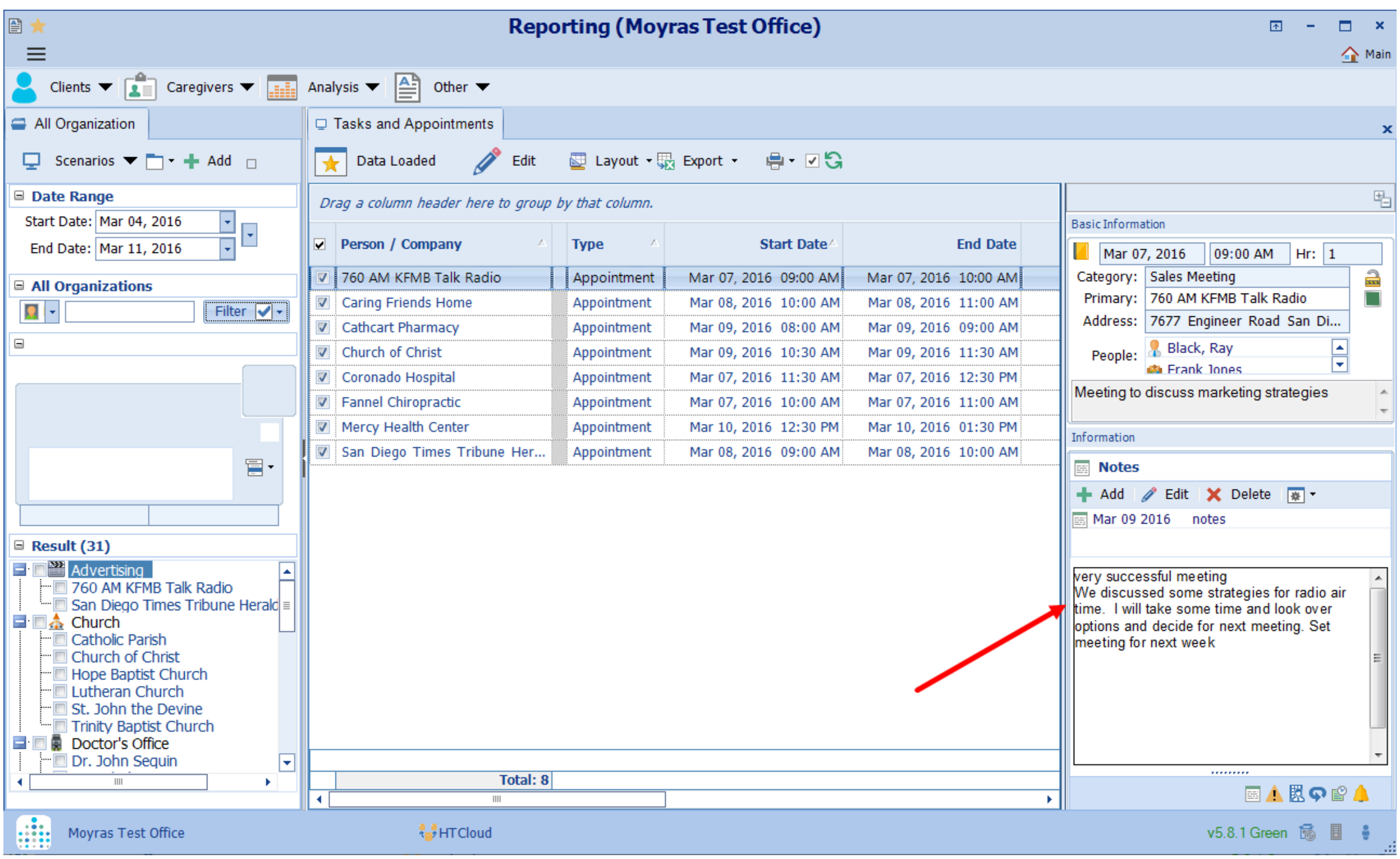


Coordinating your Week from the Desktop:

1. First, check to see if you have received any referrals in the week prior. From the ***Main Module> Reports> Clients> Documentation> Referrals*** report. Use the Scenario panel on the left-hand side to select the Date Range and choose you're **Rank** and **Districts** filter options. Click *'View Data'* to show the results. Make note of any or the organizations that have sent you referrals.



2. Next you will want to have an overview of the past week's appointments and tasks. Go to ***Reports> Organization> Documentation> Excel Style Reporting> Tasks and Appointments.*** Same as above, select the Date Range and choose your **Rank** and **District** filter options. You will want to scroll through the notes that have been documented. Make note of the right-hand panel as you go through the list, any notes taken will be visible to you for review.
NOTE: Remember to tell your sales people to make notes after each appointment….this is very important and can be done very easily from their mobile apps.



Scheduling your week:

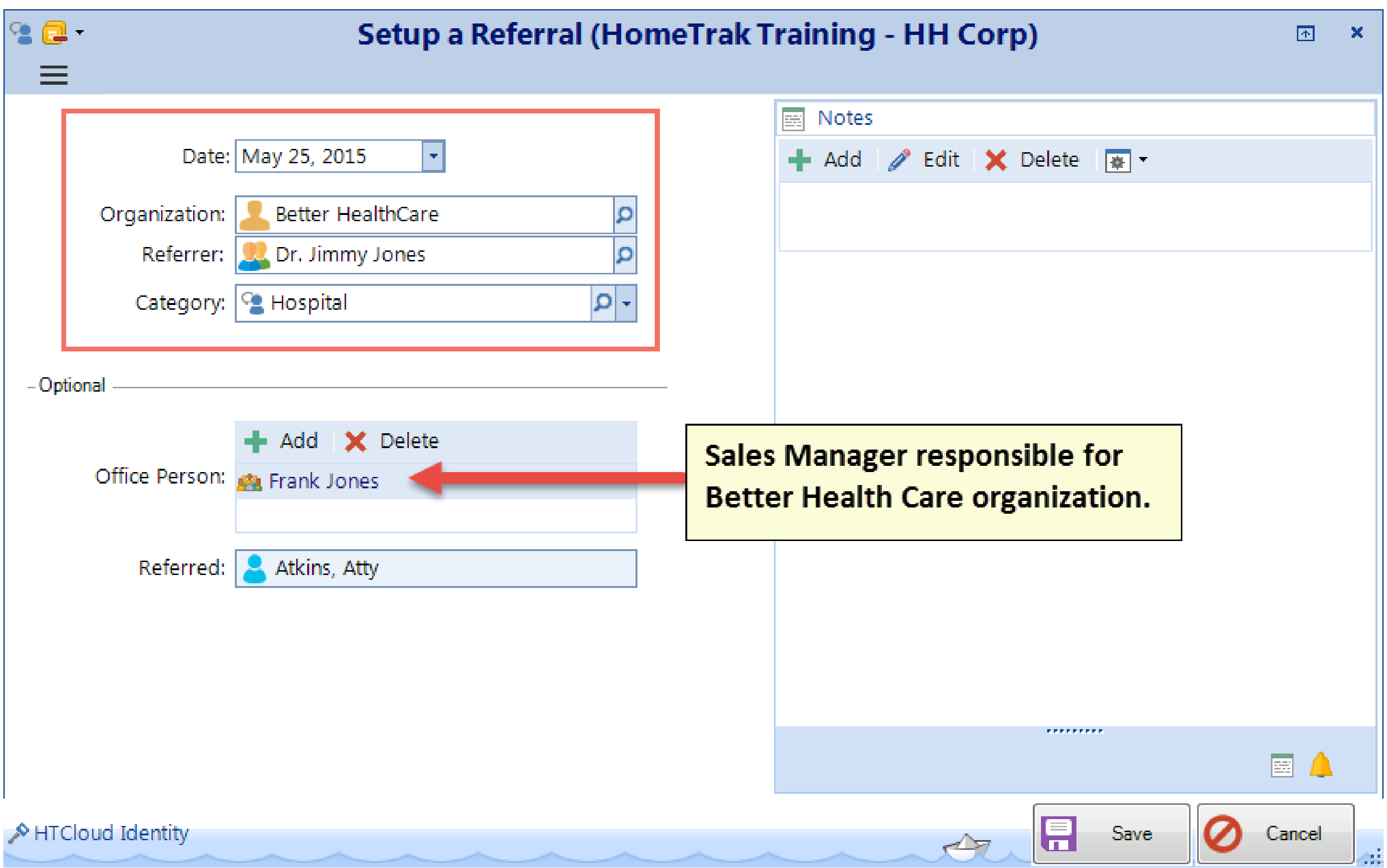
Many of your upcoming appointments and tasks will be made while you or your sales persons are on the road and using their mobile apps. ***Quick reminder…..anything you do in your mobile app will impact on your desktop version and vice versa.***

From the Relationship Module select the *Organizations* Tab next, click **Scheduling** then click **Calendar**. Now you are going to make use of the filtering feature to make the best use of your time. Decide what *District* you are going to travel in and then select the *Rank*. Basically you are telling the system what area you want to focus your appointments/tasks in AND by order of importance (the rank feature). In addition you will easily be able to see where you are falling short with regards to referral sources by rank and district.
As you click through the organizations (on the scenario panel) you can create your appointments/tasks and also see any appointments/tasks that have already been made. You have the ability to create these events for yourself or for anyone else in your office.

Go to Help System, click Scheduling then review Single Events or Recurring Events to learn how to add an Appointment or Task.

The next step: Tying your referral sources to your clients.

It is very important, when adding clients to your system, that you include the referral sources whenever possible. It is critical that you adopt this practice as well as insist your staff adopt this practice. Also, we do recommend that you are utilizing the "status" feature to track the progression of clients through your business. (Please review this help document if needed to learn about statuses.)



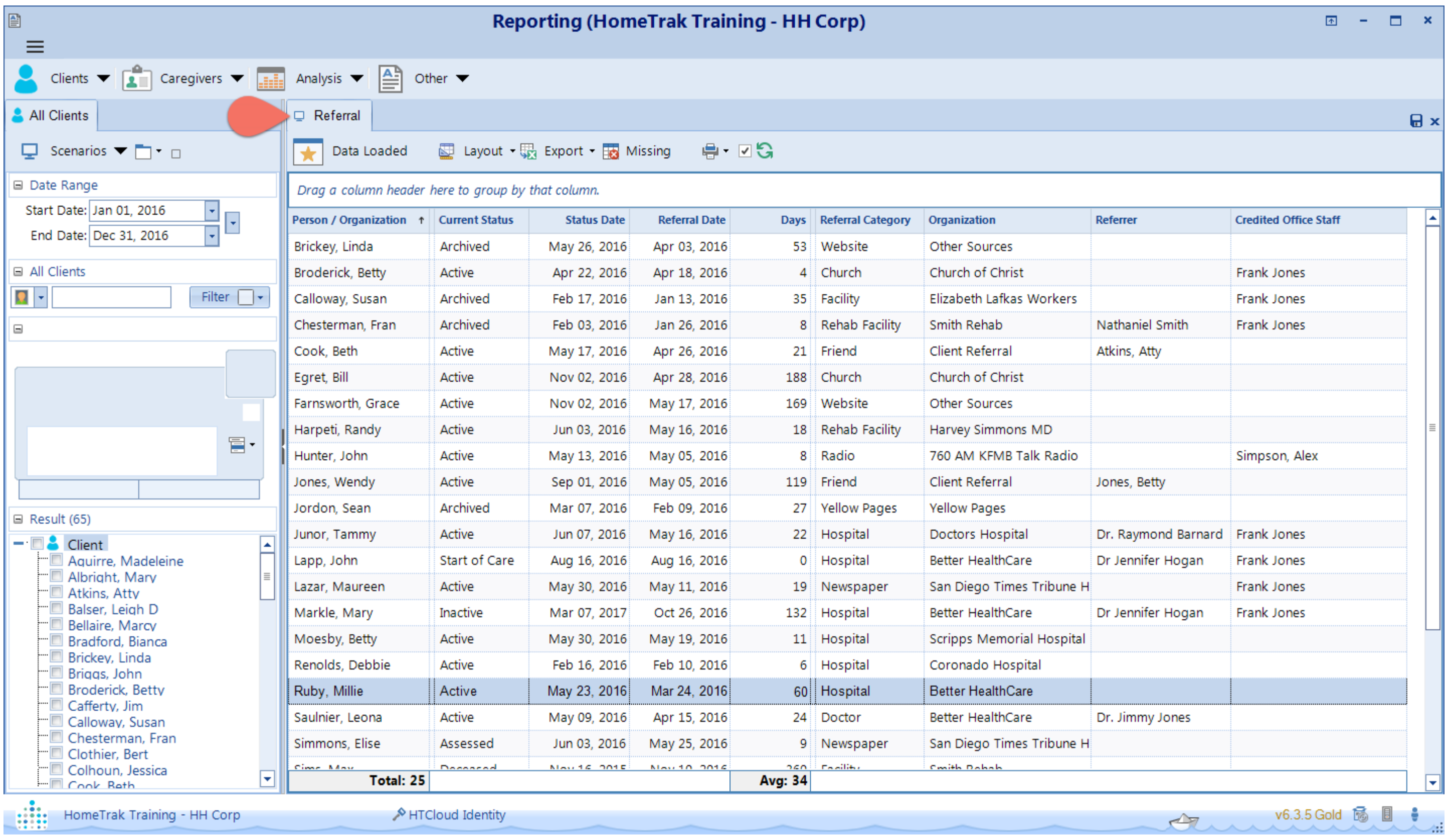
Data Mining and Analyzing for the CRM Process

Client Referrals Report

The *Referrals* report summarizes all referral information for a specific date range selected. On this report you can see when a referral was received and how long it takes a referral to move through the system, from potential to active status.

The data is derived from adding the different statuses to the client (potential through to active) and adding the Referral to the client (Organization, Referrer and Referral Category).

Main Module> Reports> Clients> Documentation> Excel Style Reporting >Referrals

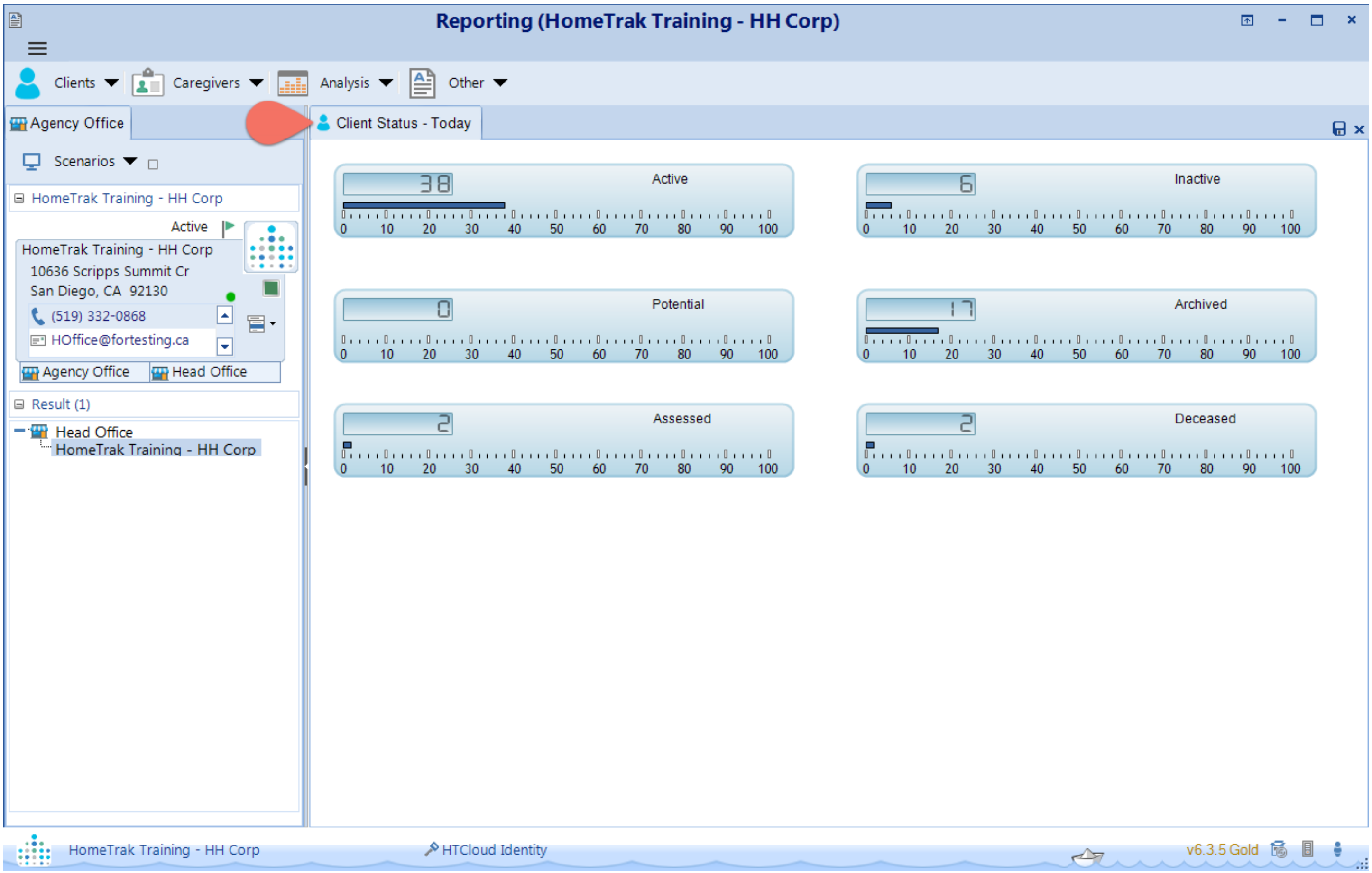


Person / Organization	Current Status	Status Date	Referral Date	Days	Referral Category	Organization	Referrer	Credited Office Staff
Brickey, Linda	Archived	May 26, 2016	Apr 03, 2016	53	Website	Other Sources		
Broderick, Betty	Active	Apr 22, 2016	Apr 18, 2016	4	Church	Church of Christ		Frank Jones
Calloway, Susan	Archived	Feb 17, 2016	Jan 13, 2016	35	Facility	Elizabeth Lafkas Workers		Frank Jones
Chesterman, Fran	Archived	Feb 03, 2016	Jan 26, 2016	8	Rehab Facility	Smith Rehab	Nathaniel Smith	Frank Jones
Cook, Beth	Active	May 17, 2016	Apr 26, 2016	21	Friend	Client Referral	Atkins, Atty	
Egret, Bill	Active	Nov 02, 2016	Apr 28, 2016	188	Church	Church of Christ		
Farnsworth, Grace	Active	Nov 02, 2016	May 17, 2016	169	Website	Other Sources		
Harpeti, Randy	Active	Jun 03, 2016	May 16, 2016	18	Rehab Facility	Harvey Simmons MD		
Hunter, John	Active	May 13, 2016	May 05, 2016	8	Radio	760 AM KFMB Talk Radio		Simpson, Alex
Jones, Wendy	Active	Sep 01, 2016	May 05, 2016	119	Friend	Client Referral	Jones, Betty	
Jordon, Sean	Archived	Mar 07, 2016	Feb 09, 2016	27	Yellow Pages	Yellow Pages		
Junor, Tammy	Active	Jun 07, 2016	May 16, 2016	22	Hospital	Doctors Hospital	Dr. Raymond Barnard	Frank Jones
Lapp, John	Start of Care	Aug 16, 2016	Aug 16, 2016	0	Hospital	Better HealthCare	Dr Jennifer Hogan	Frank Jones
Lazar, Maureen	Active	May 30, 2016	May 11, 2016	19	Newspaper	San Diego Times Tribune H		Frank Jones
Markle, Mary	Inactive	Mar 07, 2017	Oct 26, 2016	132	Hospital	Better HealthCare	Dr Jennifer Hogan	Frank Jones
Moesby, Betty	Active	May 30, 2016	May 19, 2016	11	Hospital	Scripps Memorial Hospital		
Renolds, Debbie	Active	Feb 16, 2016	Feb 10, 2016	6	Hospital	Coronado Hospital		
Ruby, Millie	Active	May 23, 2016	Mar 24, 2016	60	Hospital	Better HealthCare		
Saulnier, Leona	Active	May 09, 2016	Apr 15, 2016	24	Doctor	Better HealthCare	Dr. Jimmy Jones	
Simmons, Elise	Assessed	Jun 03, 2016	May 25, 2016	9	Newspaper	San Diego Times Tribune H		
Total: 25				Avg: 34				

Client Status – Today Report

The *Client Status – Today* report is a dashboard-style displaying the number of client by status type.

Main Module> Reports> Analysis> Status> Client Status - Today



The data is derived from adding the different statuses to the clients to track the progression of clients through your business.

Client Lead Funnel Reports

We have two lead funnel reports; one from the date of inquiry and the second from the date you consider the client to be potential.

1. Client Lead Funnel – Inquiry

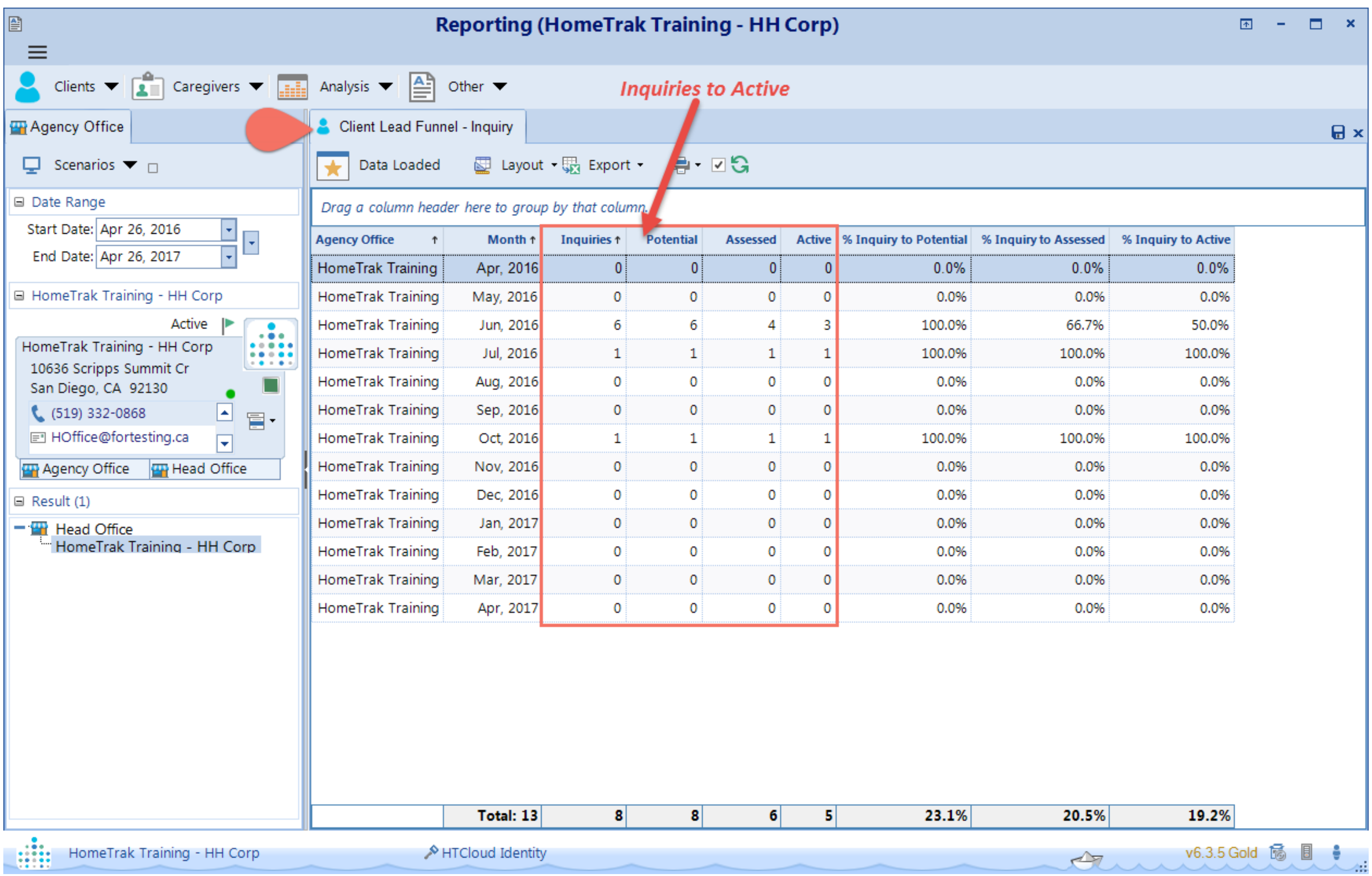
This grid provides a 12-month analysis of how many *Inquiry* clients were added each month, and how many of those clients eventually progressed through *Potential*, *Assessed* statuses and became *Active*.

NOTE: The *Potential, Assessed* and *Active* count columns in the grid always track the progress of those *Inquiry* clients added in the month, regardless of <u>when</u> their status changed to *Potential*, *Assessed* or *Active*.

EXAMPLE: In January, a prospect client is added as an *Inquiry*. In February, this client's status changes to *Potential*. The *Potential* status is counted against January in the lead funnel grid, not February. The grid does not count raw totals for each type of status on a month-by-month basis. It provides a count of *Inquiry* Clients added and analyzes how many of those *Inquiry* Clients actually become *Active*.

In order to be counted in the lead funnel, the Client must first have a *Potential* Status, followed by an *Assessed* Status before an *Active* Status. A client who is added as *Active*, without a previous *Potential* and *Assessed* status, will never be counted here.

Main Module> Reports> Analysis> Status> Client Lead Funnel – Inquiry



Agency Office	Month	Inquiries	Potential	Assessed	Active	% Inquiry to Potential	% Inquiry to Assessed	% Inquiry to Active
HomeTrak Training	Apr, 2016	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	May, 2016	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Jun, 2016	6	6	4	3	100.0%	66.7%	50.0%
HomeTrak Training	Jul, 2016	1	1	1	1	100.0%	100.0%	100.0%
HomeTrak Training	Aug, 2016	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Sep, 2016	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Oct, 2016	1	1	1	1	100.0%	100.0%	100.0%
HomeTrak Training	Nov, 2016	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Dec, 2016	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Jan, 2017	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Feb, 2017	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Mar, 2017	0	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Apr, 2017	0	0	0	0	0.0%	0.0%	0.0%
	Total: 13	8	8	6	5	23.1%	20.5%	19.2%

The data is derived from adding the different statuses to the clients to track the progression of clients through your business.

2. Client Lead Funnel – Potential

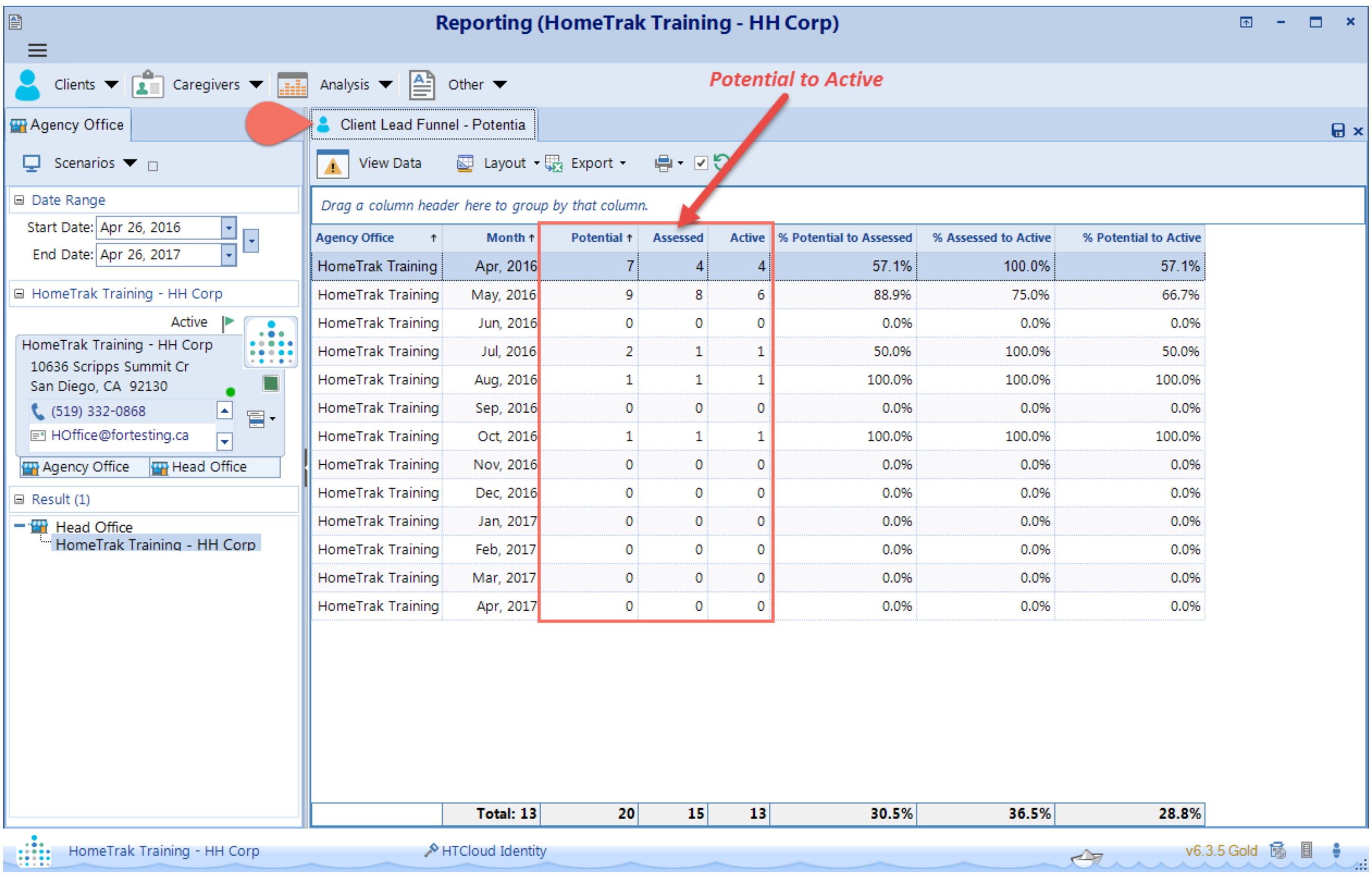
This grid provides a 12-month analysis of how many *Potential* clients were added each month, and how many of those clients eventually progressed through the *Assessed* status and became *Active*.

NOTE: The *Assessed* and *Active* count columns in the grid always track the progress of those *Potential* clients added in the month, regardless of <u>when</u> their status changed to *Assessed* or *Active*.

EXAMPLE: In January, a new client is added as *Potential*. In February, this client's status changes to *Assessed*. The *Assessed* status is counted against January in the lead funnel grid, not February. The grid does not count raw totals for each type of status on a month-by-month basis. It provides a count of *Potential* Clients added and analyzes how many of those *Potential* Clients actually become *Active*.

In order to be counted in the lead funnel, the Client must not be deleted from the Client Inquiry screen.

Main Module> Reports> Analysis> Status> Client Lead Funnel - Potential



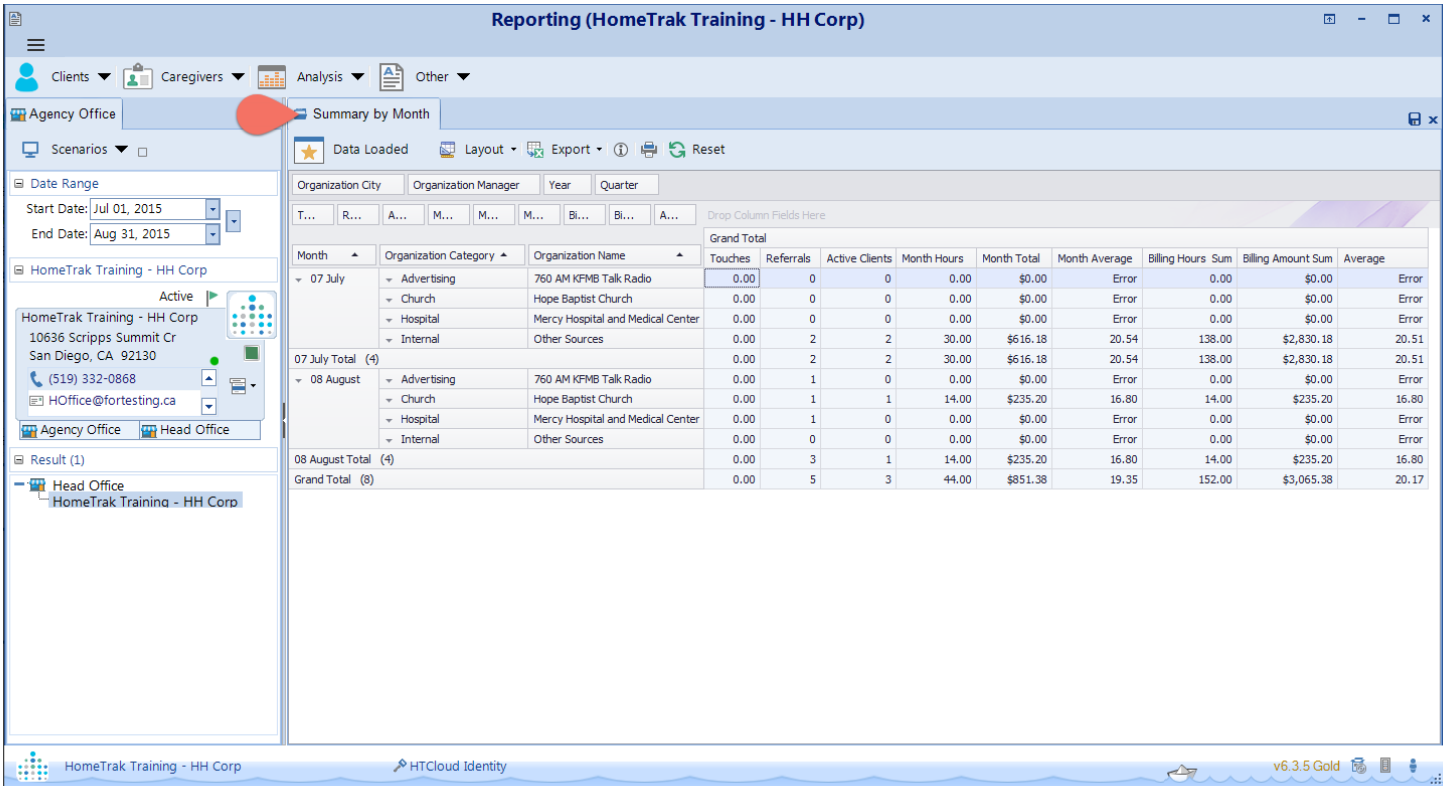
Agency Office	Month	Potential	Assessed	Active	% Potential to Assessed	% Assessed to Active	% Potential to Active
HomeTrak Training	Apr, 2016	7	4	4	57.1%	100.0%	57.1%
HomeTrak Training	May, 2016	9	8	6	88.9%	75.0%	66.7%
HomeTrak Training	Jun, 2016	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Jul, 2016	2	1	1	50.0%	100.0%	50.0%
HomeTrak Training	Aug, 2016	1	1	1	100.0%	100.0%	100.0%
HomeTrak Training	Sep, 2016	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Oct, 2016	1	1	1	100.0%	100.0%	100.0%
HomeTrak Training	Nov, 2016	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Dec, 2016	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Jan, 2017	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Feb, 2017	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Mar, 2017	0	0	0	0.0%	0.0%	0.0%
HomeTrak Training	Apr, 2017	0	0	0	0.0%	0.0%	0.0%
	Total: 13	20	15	13	30.5%	36.5%	28.8%

The data is derived from adding the different statuses to the clients to track the progression of clients through your business.

Summary by Month Report

Appointment Categories by Organization
This report shows a customizable pivot table detailing appointments with organizations; grouped by Organization Category, then Organization.

Main Module> Reports> Analysis> Referrals> Summary by Month



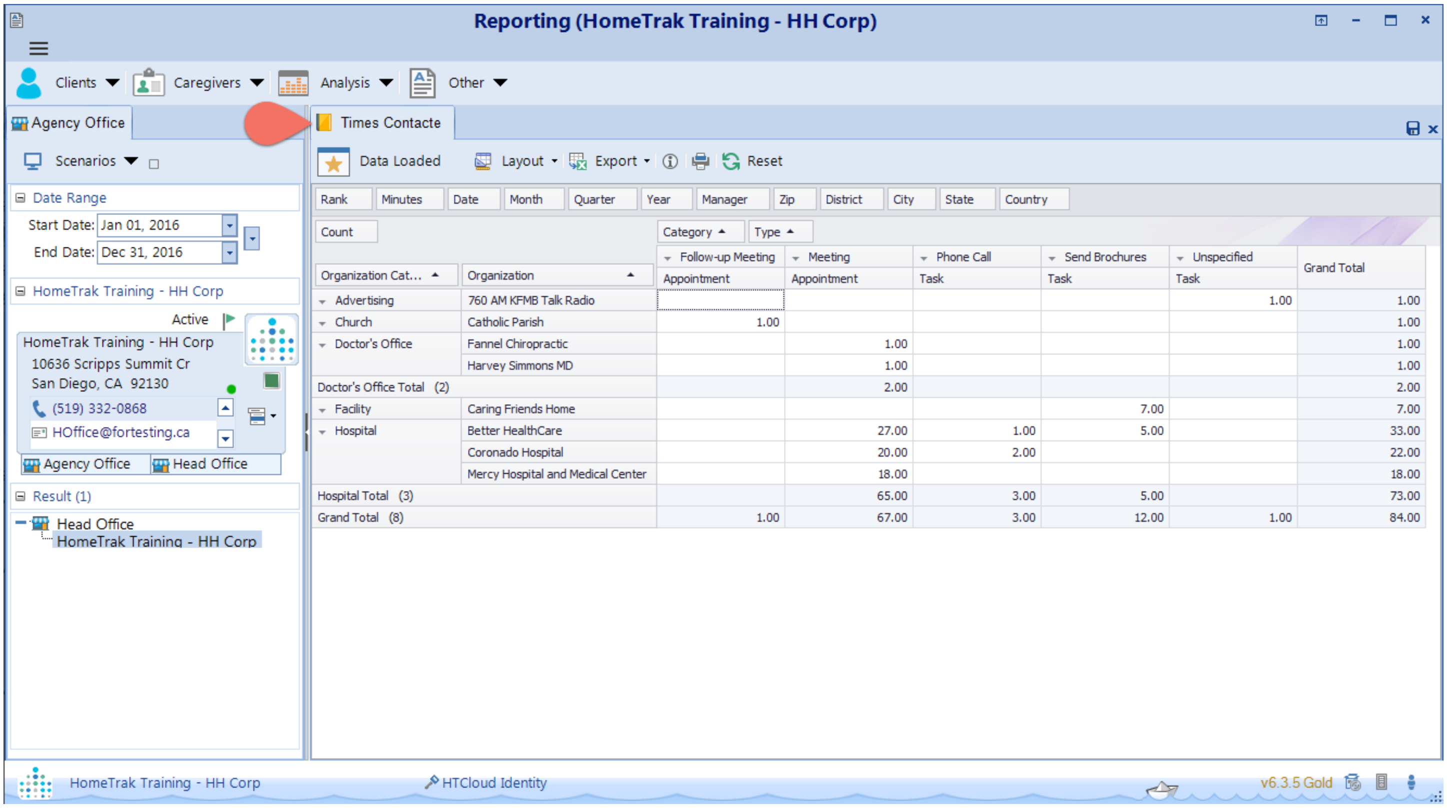
The data for this report is derived from the following:

Organization Name	Referral sources into the *Organization Module.*
Organization Category	*Organization Category* assigned to the Organization.
Touches	Your *Appointment/Task* categories you have assigned the Touch flag to.
Referrals	The *Referral* added to your clients in the Client Module.
Active Clients	The *Active Status* added to your clients in the Client Module.
Month Hours	The number of hours you have scheduled for the client within that month.
Month Total	The total revenue generated from the schedules that have been invoiced.
Month Average	Formula Calculation
Month Hours	Total sum of hours
Billing Amount Sum	Total sum of dollars
Average	Formula Calculation

Times Contacted Report

This report shows appointments and tasks with organizations; grouped by Organization Category, then Organization.

Main Module> Reports> Analysis> Referrals> Times Contacted



Organization Category	Organization	Follow-up Meeting Appointment	Meeting Appointment	Phone Call Task	Send Brochures Task	Unspecified Task	Grand Total
Advertising	760 AM KFMB Talk Radio					1.00	1.00
Church	Catholic Parish	1.00					1.00
Doctor's Office	Fannel Chiropractic		1.00				1.00
	Harvey Simmons MD		1.00				1.00
Doctor's Office Total (2)			2.00				2.00
Facility	Caring Friends Home				7.00		7.00
Hospital	Better HealthCare		27.00	1.00	5.00		33.00
	Coronado Hospital		20.00	2.00			22.00
	Mercy Hospital and Medical Center		18.00				18.00
Hospital Total (3)			65.00	3.00	5.00		73.00
Grand Total (8)		1.00	67.00	3.00	12.00	1.00	84.00

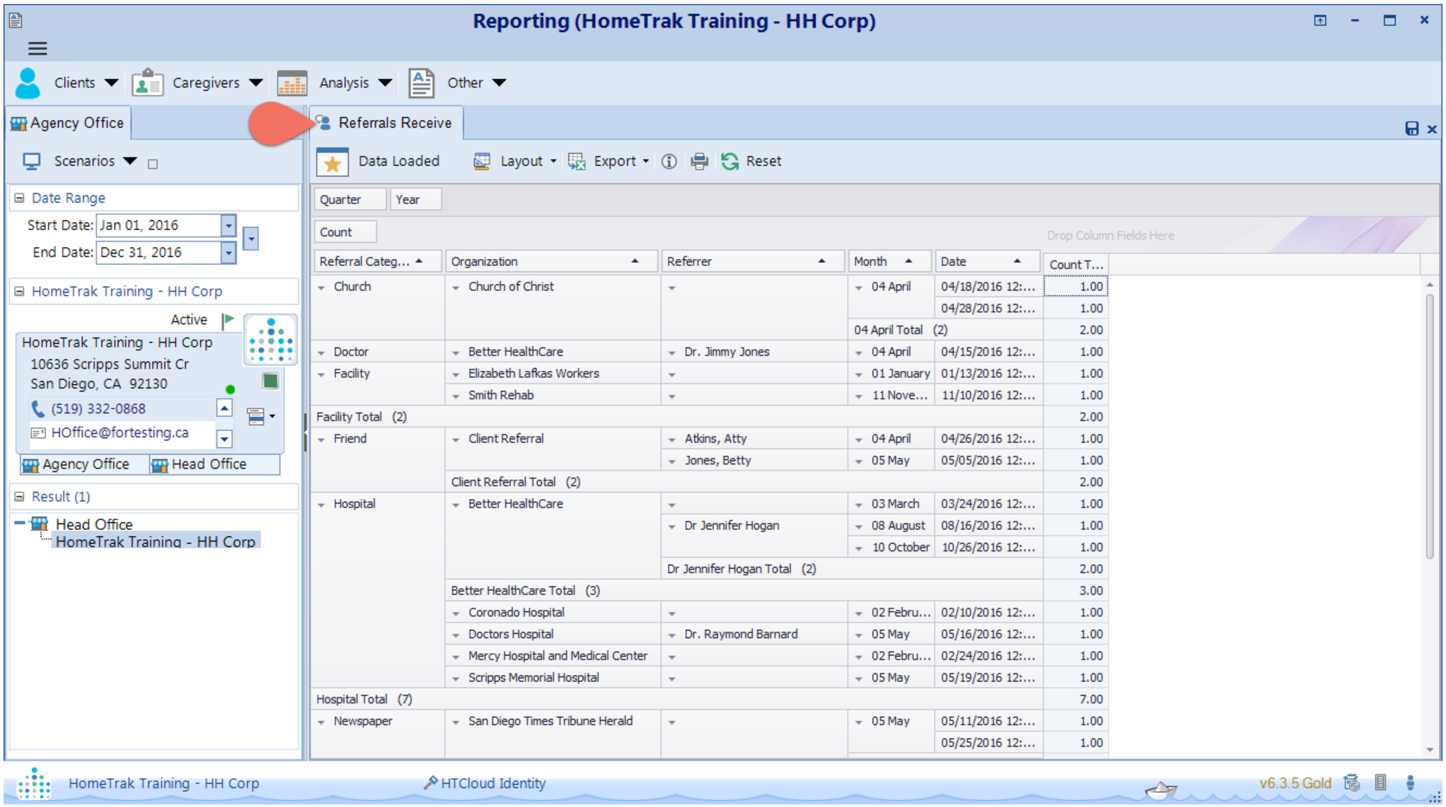
The data for this report is derived from the appointments and tasks entered on the Organization's calendar.

Referrals Received

Referrals by Organization

This report shows a customizable pivot table detailing referrals received by Organizations; grouped by Referral Category, then Organization.

Main Module> Reports> Analysis> Referrals> Referrals Received

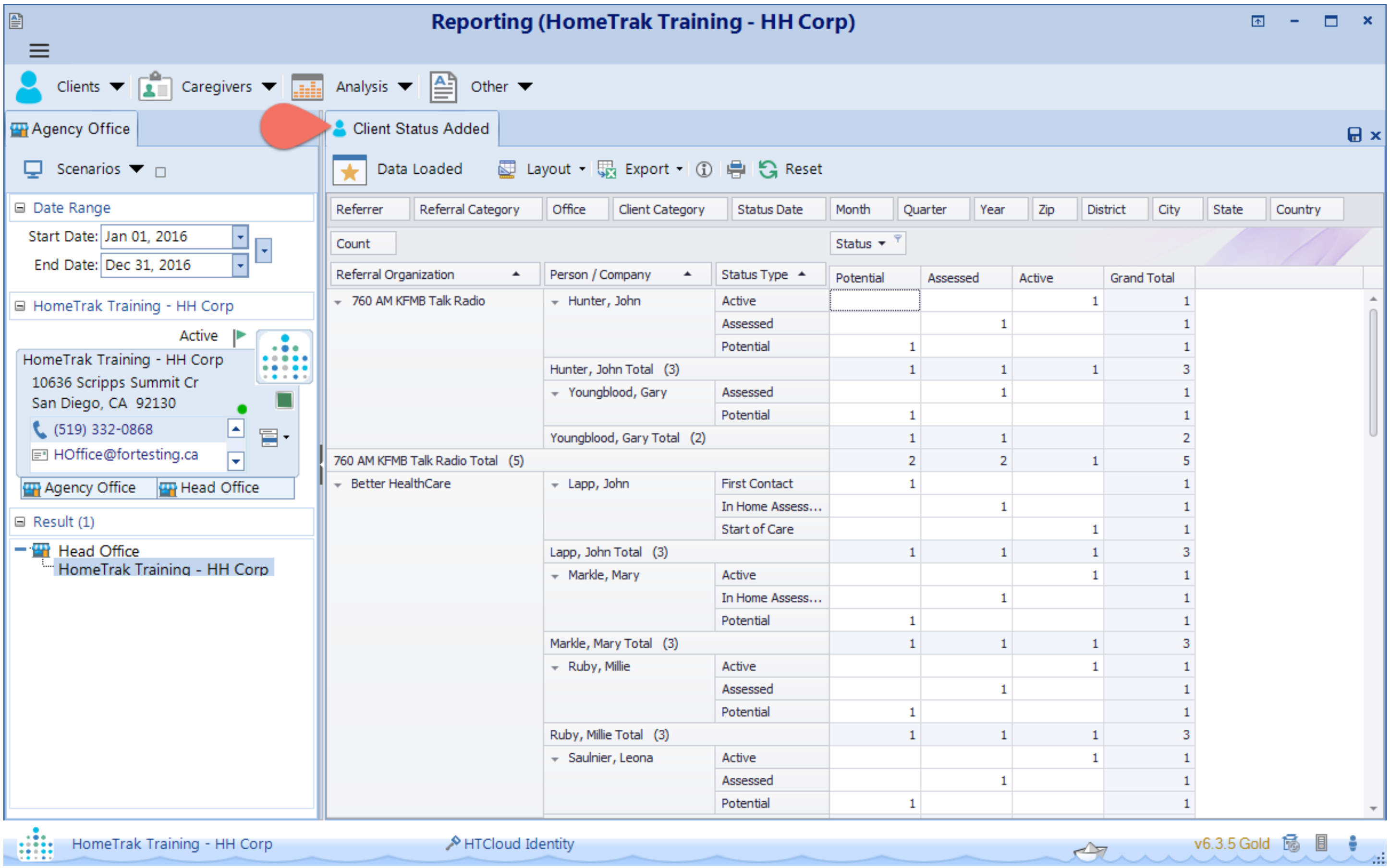


The data for this report is derived from the referral added to the client.

Client Status Added by Referral

This report shows a customizable pivot table detailing information on statuses added to Clients in the system, grouped by Referral Category, then Referral Organization.

Main Module> Reports> Analysis> Referrals> Client Status Added



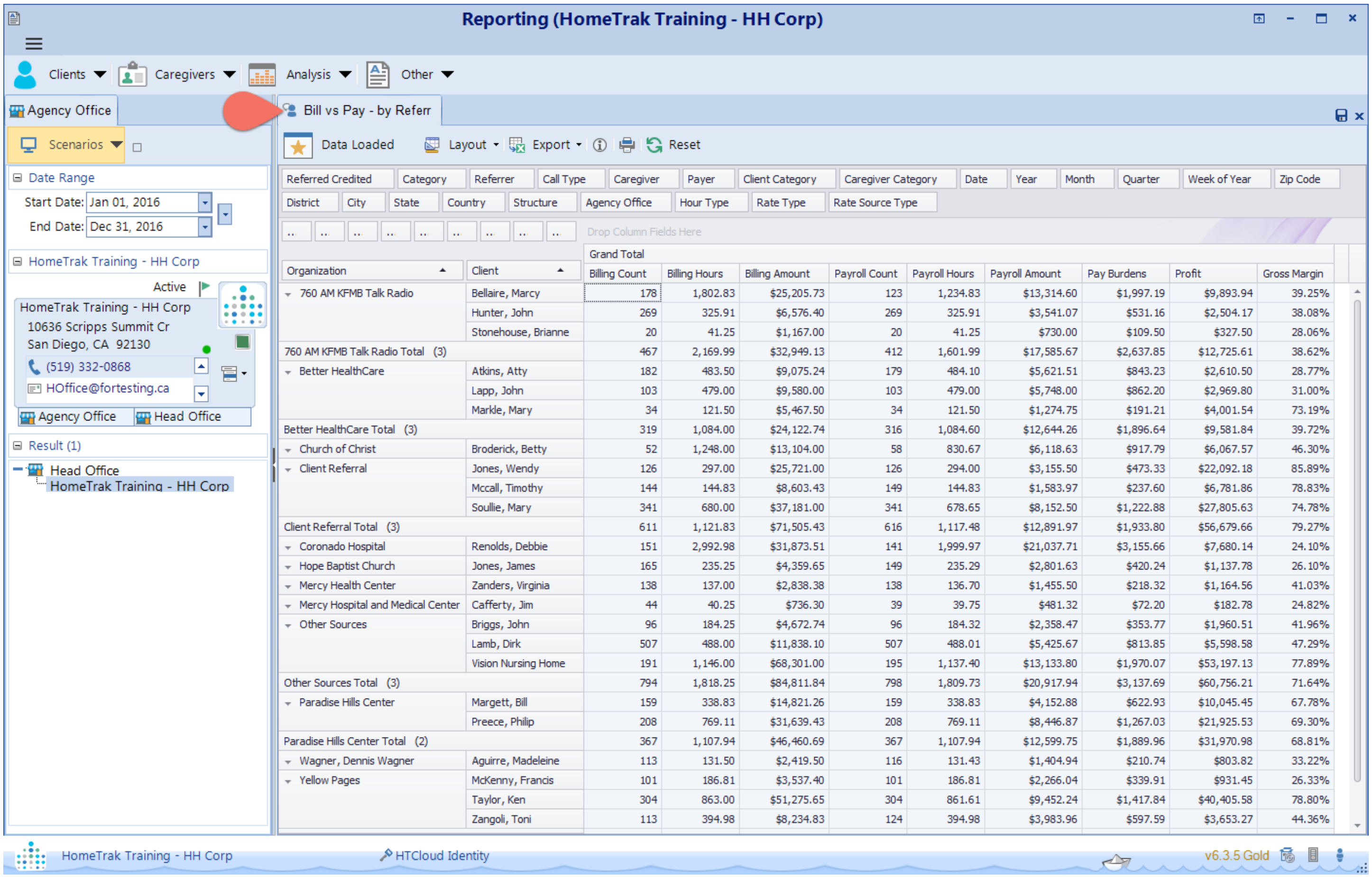
The data is derived from adding the different statuses to the clients to track the progression of clients through your business.

Revenue – Billing vs Payroll – By Referral

Sales Pivot by Referral Credited

This report shows Payroll vs Billing sales information in a customizable pivot table broken down by Organization.

Main Module> Reports> Analysis> Revenue> Bill vs Pay - by Referral



Organization	Client	Billing Count	Billing Hours	Billing Amount	Payroll Count	Payroll Hours	Payroll Amount	Pay Burdens	Profit	Gross Margin
760 AM KFMB Talk Radio	Bellaire, Marcy	178	1,802.83	$25,205.73	123	1,234.83	$13,314.60	$1,997.19	$9,893.94	39.25%
	Hunter, John	269	325.91	$6,576.40	269	325.91	$3,541.07	$531.16	$2,504.17	38.08%
	Stonehouse, Brianne	20	41.25	$1,167.00	20	41.25	$730.00	$109.50	$327.50	28.06%
760 AM KFMB Talk Radio Total (3)		467	2,169.99	$32,949.13	412	1,601.99	$17,585.67	$2,637.85	$12,725.61	38.62%
Better HealthCare	Atkins, Atty	182	483.50	$9,075.24	179	484.10	$5,621.51	$843.23	$2,610.50	28.77%
	Lapp, John	103	479.00	$9,580.00	103	479.00	$5,748.00	$862.20	$2,969.80	31.00%
	Markle, Mary	34	121.50	$5,467.50	34	121.50	$1,274.75	$191.21	$4,001.54	73.19%
Better HealthCare Total (3)		319	1,084.00	$24,122.74	316	1,084.60	$12,644.26	$1,896.64	$9,581.84	39.72%
Church of Christ	Broderick, Betty	52	1,248.00	$13,104.00	58	830.67	$6,118.63	$917.79	$6,067.57	46.30%
Client Referral	Jones, Wendy	126	297.00	$25,721.00	126	294.00	$3,155.50	$473.33	$22,092.18	85.89%
	Mccall, Timothy	144	144.83	$8,603.43	149	144.83	$1,583.97	$237.60	$6,781.86	78.83%
	Soullie, Mary	341	680.00	$37,181.00	341	678.65	$8,152.50	$1,222.88	$27,805.63	74.78%
Client Referral Total (3)		611	1,121.83	$71,505.43	616	1,117.48	$12,891.97	$1,933.80	$56,679.66	79.27%
Coronado Hospital	Renolds, Debbie	151	2,992.98	$31,873.51	141	1,999.97	$21,037.71	$3,155.66	$7,680.14	24.10%
Hope Baptist Church	Jones, James	165	235.25	$4,359.65	149	235.29	$2,801.63	$420.24	$1,137.78	26.10%
Mercy Health Center	Zanders, Virginia	138	137.00	$2,838.38	138	136.70	$1,455.50	$218.32	$1,164.56	41.03%
Mercy Hospital and Medical Center	Cafferty, Jim	44	40.25	$736.30	39	39.75	$481.32	$72.20	$182.78	24.82%
Other Sources	Briggs, John	96	184.25	$4,672.74	96	184.32	$2,358.47	$353.77	$1,960.51	41.96%
	Lamb, Dirk	507	488.00	$11,838.10	507	488.01	$5,425.67	$813.85	$5,598.58	47.29%
	Vision Nursing Home	191	1,146.00	$68,301.00	195	1,137.40	$13,133.80	$1,970.07	$53,197.13	77.89%
Other Sources Total (3)		794	1,818.25	$84,811.84	798	1,809.73	$20,917.94	$3,137.69	$60,756.21	71.64%
Paradise Hills Center	Margett, Bill	159	338.83	$14,821.26	159	338.83	$4,152.88	$622.93	$10,045.45	67.78%
	Preece, Philip	208	769.11	$31,639.43	208	769.11	$8,446.87	$1,267.03	$21,925.53	69.30%
Paradise Hills Center Total (2)		367	1,107.94	$46,460.69	367	1,107.94	$12,599.75	$1,889.96	$31,970.98	68.81%
Wagner, Dennis Wagner	Aguirre, Madeleine	113	131.50	$2,419.50	116	131.43	$1,404.94	$210.74	$803.82	33.22%
Yellow Pages	McKenny, Francis	101	186.81	$3,537.40	101	186.81	$2,266.04	$339.91	$931.45	26.33%
	Taylor, Ken	304	863.00	$51,275.65	304	861.61	$9,452.24	$1,417.84	$40,405.58	78.80%
	Zangoli, Toni	113	394.98	$8,234.83	124	394.98	$3,983.96	$597.59	$3,653.27	44.36%

The data for this report is derived from the posted billing clients and payers and the posted payroll for caregivers.