

2026 ANNUAL CONFERENCE & EXPO
 Celebrating 60 Years
 Then. Now. Next.

Mastering Inquiry & Assessment

A complete training guide for home care agencies – from the first phone call to a signed agreement.

HOME CARE SALES TRAINING

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PART ONE

Inquiry Management – Mastering the Call

Every person in your agency must know how to handle an inquiry call. Most agencies lose clients **before they ever meet them** – and it's happening on those calls.

Track Every Inquiry
 Agencies that track every inquiry generate measurably more revenue.

Fear Is the Enemy
 A subconscious fear stops staff from fully engaging – learn to interrupt it.

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Who Handles the Call

Every team member must be trained – no call should go unanswered because the "right" person isn't available.

Executive Director
 Sets the standard for inquiry culture agency-wide.

Marketer
 Bridges outreach efforts with live inquiry handling.

Scheduler & Recruiter
 Must be ready to step in and keep the conversation alive.

Administrative Assistant
 Often the first voice a prospect hears – training is non-negotiable.

⚠ The single most expensive mistake: letting a call go unhandled when the primary contact is unavailable.

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The 5 Types of Callers

Each caller arrives in a different emotional state. Adjust your approach and language accordingly – and never take a difficult tone personally.

The Researcher
Gathering info, not ready to commit.

The Crisis Caller
Urgent need, high emotion – needs calm reassurance.

The Price Shopper
Most likely to be shocked by pricing – address before price comes up.

The Skeptic
Sounds angry or short – It has nothing to do with you.

The Ready Buyer
Decided – just needs a reason to choose you.

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How to Handle the Call

Build Genuine Rapport
Connect personally, avoid pitching.

Open with Purpose
Tell callers where you're taking them.

Ask for Assessment
Request permission to assess needs.

Tell callers where you're taking them – this reduces anxiety and keeps the conversation moving forward.

Guide the Conversation
Lead with clear next steps.

Never Volunteer Pricing
Know exactly what to say when they ask – before you're ready to share it.

Control Emotional Calls
When a caller is venting or threatening to hang up, listen first – then redirect.

Drop the Jargon
Industry terms make callers feel confused and excluded. Speak plainly.

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The Dos and Don'ts

Always Ask for the Assessment
Most agencies skip this – and it's costing them significantly.

Explain Every Transfer & Hold
Never leave a caller confused about what's happening or why.

Book Before You Hang Up
Use exact language to secure the assessment before ending the call.

The Golden Rule
Never make the inquiry wait. This is more common than agencies realize – and it is the fastest way to lose a client you never had a chance to meet.

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Tracking & Secret Shopping

The Inquiry Tracking Sheet

Every field matters. Use it to convert cold and warm leads into future hot leads – and ensure every team member follows the same process consistently.

- Leads that don't convert today still have future value. Keep them alive with a system.


Secret Shopping: Highest-ROI Activity

Shop your own agency using recorded calls to find training opportunities – without making it punitive. Then shop your competition and listen carefully for what they're doing right.

- What you learn from a competitor's call can transform your own team's approach.

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What Happens When You Sit Down With the Family


PART TWO

The bridge from inquiry to assessment: how you handled the call shapes what the family walks in expecting. **Closing is not selling** – it's a systematic, trust-building conversation with a clear sequence.

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The Sales Presentation Binder



The single most powerful tool in a home care closing conversation. Having the binder open on the table **before you say a word** begins shifting trust in your favor.

Shortens the Assessment

From 1 hour 45 minutes to under 1 hour on average.

Law of Thermodynamics

Bring order to the room – families stop interrupting, price-shopping, and taking control.

Pricing Question Script

Know word-for-word what to say when they ask before you've finished the presentation.

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Learning About the Prospect

Prepare Break the Ice Listen & Reflect

The assessment conversation must go deeper than the inquiry call. Show up already knowing their situation – and make them feel heard, not sold to.

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Presenting Your Agency

Tell Your Story
Make your agency memorable and human – not corporate.

Certifications & Licensures
Include them in the binder – they are proof points, not sales pitches.

Day-in-the-Life Calendar
Help families visualize the value of care before they've committed.

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The Objection Cycle

Acknowledge

Clarify

Educate

Redirect

Stop calling them objections. They are requests for more information. Viewing them as attacks makes you defensive – and that ends the sale.

Most Common Objections

- "It's too expensive"
- "We don't need that many hours"
- "I need to talk to my siblings first"
- "We're not ready yet" / "Let me think about it"


Learn word-for-word responses – without pressure or desperation.

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Asking for the Sale


- Create Urgency Honestly**
Offer a trial period, waive the consultation fee, or use the 3-day minimum as a closing tool – no manipulation.
- Smile and Nod**
Non-verbal cues make prospects more comfortable saying yes.
- The Closing Question**
"Do you want me to go ahead and get that paperwork started?"
- How You Exit Matters**
If they need time, how you leave the room is as important as everything before it.



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Winning Hearts, Not Just Clients



The home care decision is an emotional decision first and a logical decision second.

Your job is not to pressure someone into care. It's to make them feel **safe enough to say yes.**

- Transparency Wins**
A no-hidden-agenda approach builds more trust than any sales technique.
- Trust Is the Close**
When families feel understood and safe, the decision makes itself.

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Thank You!

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