



**2026 ANNUAL
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Empowering Your Office Sales Team:
From Referral Intake Call to In-Home Assessment

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About the Presenter




Thomas Rose is CEO & President of 21st Century Health Care Consultants. A former Army Special Forces Officer (Green Berets), his business experience includes a successful leadership track in the General Electric companies, encompassing Director 6 Sigma Quality, Director Sales, Sr. Director FP&A, VP Operations and culminating as Chief Financial Officer of GE's \$2B asset management company. Following GE, Thomas focused his career on growing PE-backed, lower middle market businesses as their company President or Executive Vice President in a variety of sectors, from automotive, manufacturing, facilities maintenance, and healthcare.

Thomas' Fortune 500 C-level expertise combines with over nearly two decades of business leadership. Thomas received his undergraduate B.S. Degree in Management from Methodist University, MBA from Webster University, and Private Equity, M&A and Corp. Development Certificates from The Wharton School of Business. Thomas is a certified Six Sigma Master Black Belt and Lean Six Sigma Quality Certifier.

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Learning Objectives

While community liaisons and marketing efforts are vital for generating referrals, the sales process truly begins when a prospect contacts your agency. This presentation emphasizes the importance of equipping your staff with the skills to guide callers seamlessly from inquiry to assessment scheduling.

1. Discover the essential steps in training your office staff to effectively convert referral phone calls into scheduled in-home assessments.
2. Learn how to instill consistency in phone etiquette, develop scripts for open-ended discovery questions, and address frequently asked questions and objections.
3. Gain insights on transitioning the conversation towards scheduling the in-home assessment, ensuring your office sales team plays a confident and integral role in driving census growth for your agency.

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Referral Packet

Create a referral packet

- Your company story
- Services Sheet
- Third-party Satisfaction Reports
- Client and caregiver testimonials
- Service Area Map
- Awards you've earned
- Onboarding Process Sheet
- Team Bios

This should serve for your referral partners to their clients as well as to yours



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Intake Call

5 Steps of the Intake Referral Call

- Greeting
- Discovery and Listening
- Empathy, Knowledge, and Confidence
- FAQs and objections
- Schedule the in-home assessment



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Training Staff

Protocol and Training Your Staff

- Create a standard greeting for all incoming calls
- Create a script for each stage of the call: Discovery Questions; FAQs & Objections; Closing
- Build the scripts together as a team. This can be a team building exercise.
- Practice with your staff. Secret Shopper calls. Role playing scenarios to train and critique as a group. Build confidence by working together and practicing together.
- No free lancing is allowed. This is your brand.



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The Greeting

Sample Greeting

- No variations. Set the tone every time
- Always ask the callers name and phone number before moving to the next step
- "Thank you for calling...my name is...how may I help you today? "May I get your name and the best number to call you in case we get disconnected?"
- Throughout the call, address the caller by their name



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Discovery Questions

Why ask Discovery Questions?

- Your goal as an internal sales team is to encourage the person who is calling to tell their story
- Open ended Discovery questions create a conversational engagement rather than a transactional presentation
- It provides your team the opportunity to empathize and express understanding of their situation
- Allow your team's personalities to shine



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Open Ended Questions

How to Manage the call: Open Ended Discovery Questions/Prompts

- Please tell me what is happening with your...?
- What are your primary concerns?
- What are the obstacles you perceive to... accepting help?
- What are the hobbies or activities... needs help with?
- What are the things... really misses doing that they can't do without assistance?



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Manage the Call

How to manage the call: FAQs and Objections

- Why do you cost so much?
- Can you lower your prices?
- What type of training do your caregivers receive?
- Do you do background checks on your caregivers?
- What if we don't like the caregiver?
- Can we have the same caregiver every time?



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Critical to Consistency

FAQs and Objections Script Integrity

- Do not deviate from the script you create - no free lancing!
- These answers must be identical for each referral call
- If the caller calls back in 6 weeks asking the same questions again, you must provide the same answers
- Consistency of the message is a hallmark of stability and expertise



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Change How Your Staff Handles the Phone and Increase Your Business Success!

Questions?




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Thank You!

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