Client check-up calls

Have your staffing coordinators or those managing your schedule use this tool to gain client feedback and improve client satisfaction.

Guide & Checklist

Purposes:

1. To make a weekly connection with your clients and improve communication.
2. To ensure your clients and their families are aware of the weekend’s and following week’s schedules.
3. To help minimize misunderstandings with schedules and other challenges.
4. To boost the overall satisfaction of your clients, paving the way for more referrals.
5. If the client/family member is an obvious promoter/happy client, it is a great time to remind them to think of others who could benefit from your services the way they have.

Guidelines:

1. Person who is receiving the calls: Responsible parties of your clients. This could be the client, daughter, son, etc. The majority of your clients, especially those who have weekend care, should be called. Sometimes there are circumstances where it may not be appropriate for a client to be called every week.
2. Person who is making the calls: Typically Staffing Coordinators or those who manage the schedules. It is best to assign the same Staffing Coordinators to call the same clients every week so relationships can be established.
3. Suggested duration of each call: 3-5 minutes.
4. Time management: Make sure this is the primary focus for your Staffing Coordinators on Friday’s. Weekend schedules should be worked through and assigned Monday-Thursday.

Call Checklist:

☐ Build trust – Keep track of personal events and circumstances so you can ask them specifically about them (e.g. “How did your grandson do in his game last week?”)

☐ Review the weekend and the next week’s schedule – Review the schedule and, if possible, offer to e-mail the schedule to them as well. Tell them exactly who their caregiver(s) will be and discuss anything out of the norm.

☐ Overall Client Experience – Are they experiencing The Client Experience you want to provide?

☐ How are they benefiting? – If appropriate, ask how they are currently benefiting from the services.

☐ Ask for the referral – If appropriate, ask them if they know anyone who could benefit from the services they think of a way they have.

☐ Suggested improvements – Ask them if they have any recommended suggestions to the care. Special note: Though it is human nature for people not to openly share suggestions with their provider directly, it is still important to show them you are open to feedback even if the most common answer is, “no, not at this time.”