

Core Assumptions

Strategic

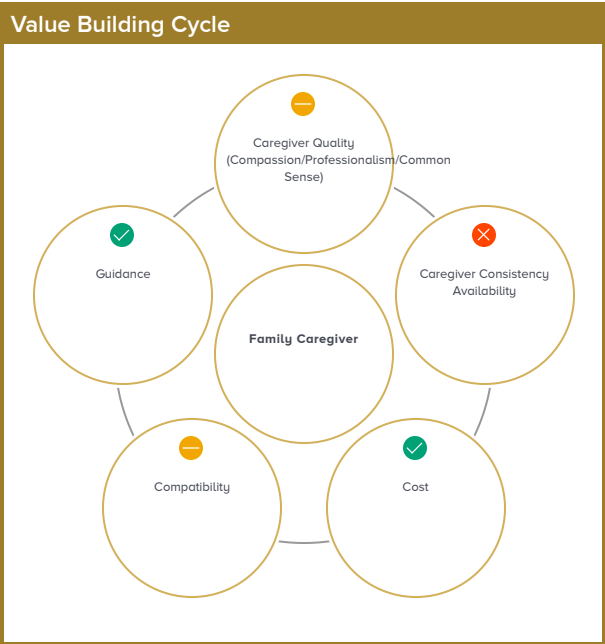
- Geographically positioned to grow
- Caregivers are people priority #1
- Caregiver growth and retention = increased client growth

Operational

- Great team (takes all of us!)
- Systems and processes have to keep up for growth
- Recruitment of caregiver/staff is critical

Financial

- Profit over revenue – manage overtime
- Grow/grow/grow and incentivize team



Our "Big Idea" Core Strategies

STRATEGIC

- Grow Personal Relationships with clients and caregivers (use technology)
- Client Minimums – ID ideal clients that have long term needs for longer shifts and define what they get from us (value)
- Price Rate Structure – based on services/time/ect. – sliding scale option
- Caregiver Recruitment
- Feedback Loop for Ideas
- Leverage RAH Corp. for best practices/idea

OPERATIONS

- Decision Tree – 1st call to expiration
- ID every decision, tied to roles and use with clear care
- Employee retention plans
- Client retention plan
- New office up and running with centralized cloud based doc storage
- Hire process for key roles

FINANCIAL

- Funding game plan for Snellville and Fay.
- Maintain 40% or greater G.P.
- Fund online digital strategy for growth
- Create ROI study on price rate structure – client minimums/no "as needed"
- Acct. Receivables to decrease
- Funding of employee retention 401k/bonus

Our Mission

We're setting the standard in full service home care by providing compassionate care for our clients while promoting their dignity and independence.

Our Vision

Where We Stand

- 21000 hr. each for the 3 territory
- A field office in each territory with scheduler/HR/Marketer in each
- 69000 hrs. across company
- Team culture is strong/healthy teamwork/dream- respect and dignity – safe environment
- Quality of caregiver is outstanding
- Client care is exceptional
- Our systems/processes allow us to scale and be consistent
- Caregiver retention with tenure
- 400+ caregivers
- RAH top 10% ranking/get unstuck!
- Figured out a way to stay in contact with clients/families to keep pulse on needs
- Successfully struck a balance between growth and great client care
- Digital marketing success for sales and recruitment
- Clients/caregivers retention and referrals programs are working
- Successful onboarding program

Where We're Heading

- Duplicate key positions essential for growth: Scheduler; HR – interview/onboard; Marketer; "I.T." Care Coordinator – relational focus
- Use of technology to connect with clients/families and caregivers – automation tools/systems processes
- Look for office in Napersville
- Implement solid retention program
- ID system/processes and prioritize which are key for growth
- Onboarding program of 30/60/90 day program properly equip staff for success
- 90 day reviews to maintain culture
- Evaluate our hiring process – head/heart/briefcase = culture fit; use of depr. heads in process
- Timeline for Sharpstown office; Benton Feb 2021; Fay. Feb. 2022?
- Continue our digital marketing for growth
- Rate scale per location and pay scale
- Assess team on retention
- Target marketing specific to each location
- Finance Plano

Strategic Dashboard

RISKS

← HIGH RISK | LOW RISK →

HIGH PRIORITY

Work Force

3.5

Covid

4.5

Economy

4.5

Systems/Processes/Clear Care

2.5

Staff Retention/Incentive Plan

4.5

LOW PRIORITY

Work Life Balance

2

PERFORMANCE MODEL

Marketing Goals

Plano
2020: 1150 hours
2021: 2000 hours

OKC
2020: 550 hours
2021: 1000 hours

Conway
2020: 1050 hours
2021: 1000 hours

Gross Profit Margin

430%–41%

Client Satisfaction Score

8.5

Caregiver Satisfaction Score

8.5

Caregiver Retention Goal

Clear Care: Turnover % (60 Day Goal)

Not Scheduling (Overtime)

2% of Total Hours
Caregiver Hourly Rate: \$12

PERFORMANCE DRIVER

← HIGH PERFORMANCE | LOW PERFORMANCE →

Customer Service

2.5

Client Retention

4

Quality Caregivers (3)

4.5

New Clients and Care Giver/Marketing

2.5

Scheduling (Care Giver utilization)

3

Action Initiatives Profile				
CORE ISSUE	PLAN NAME	OBJECTIVE	DELIVERABLES (BY)	(LEADER) TEAM
Caregivers	1A. Quality; 1B. Recruitment; 1C. Retention; 1D. Training	Caregiver Focus: quality; recruitment; retention; training	Modify and implement retention plan with 30, 60, 90 day touch (12/31/20) Secure CG formula for hire and we are recruiting appropriate # for hire (12/31/20) Along with annual skills check we are providing ongoing training with CG (12/31/20) Caregiver satisfaction report 8.5 or greater (12/31/20)	(Lonnie) Mary; Le'Ana; Tamm Valerie; Mossah; Dorothy
Systems and Processes	2A. Decision Tree; 2B. Review Docs from Mark; 2C. Clear Care Use	Evaluate System and Processes: decision tree; review existing docs; use of clear care	Create a visual decision tree that illustrates the entire process from 1st client call through client end of care; document includes rules/people/clear care/other technology (12/31/20) Google doc of duplicate task (12/31/20) Review and update procedural manual (12/31/20)	(Anna) Mark; Dept. Heads; Ma
Rates	3A. Sliding Scale; 3B. Client Minimums; 3C. Caregiver Rates and Geography/Local	Evaluate our rates: slide scale; client minimums; rate for caregiver based on location	Create multiple rate scenario for evaluation (12/15/20) Do a market analysis to determine rate range in all 3 territories (12/15/20) Profit margin goal of 42% (12/15/20)	(Mathew) Suzie, John
Rates	4A. Define Goals for All Employees; 4B. Reporting Data	Performance Goals: define goals for all employees; reporting data	All staff can state their goals (11/30/20) Reports are printed weekly then monthly and are automatically emailed to staff (11/30/20) Dashboard defined in clear care (11/30/20)	(Le'Ana) David and Louisa

