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The Winning Private Clients handbook

**A practical guide for domiciliary
care businesses in the UK**



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Introduction

We stand at a crossroads in homecare. Rising costs and paper-thin margins have created unprecedented financial pressure. Empty promises and pockets at a government and local authority level have created a disconnect between council contracts and sustainable businesses.

To create a sustainable future for our sector and our businesses, we have to innovate.

This book explores one way in which this can be done: through the growth of a private client base.

My experiences working with one of the largest homecare groups in the UK has led me to develop a number of tried and tested strategies that can result in your organisation becoming a private client powerhouse - and I'm excited to be able to share them with you in this book.

Expect practical templates, checklists, and step-by-step guides to take domiciliary care businesses of any size from dependence on council tenders to sustainable revenue streams within their control.

The advice here has also been guided by members of the Executive Wing - Birdie's group for the UK's largest care providers. Our thanks to them, and the many other providers who have contributed their thoughts and recommendations for this guide.

I hope you find it useful - and best of luck!

Danielle Roberts,
Implementation & Enablement at Birdie



Why grow a private client base?

If you're reading this, you may already have a clear idea on why private clients are a good avenue for a care business seeking financial stability. Government and council margins are thin, the scope of contracts leaves many businesses struggling to provide the level of care they want and not being in control of your own rates creates untold difficulties.

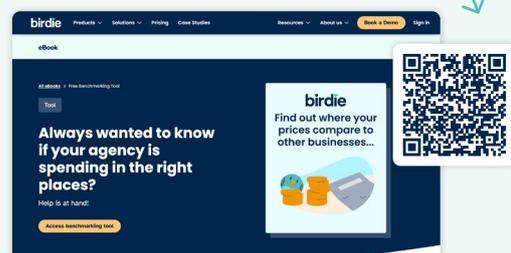
The bottom line

- The Homecare Association has defined the minimum viable hourly rate for 2025-26 for domiciliary businesses as £32.14
- The average hourly rate paid by Local Authorities ranges from £16.86 to £21.53 depending on region (as of early 2025)
- Staff wages, National Insurance, pension contributions, and training costs continue to rise year-on-year
- Regulatory requirements increasingly demand higher staffing ratios and qualifications, further increasing overheads
- Transportation costs continue to escalate, particularly in rural areas where travel between clients is extensive

Now consider that data shows that private client rates across the UK typically range from £25 to £38 per hour. This is not just aligned to the ideal viable rate, but is a figure largely controlled by providers themselves. This wider margin can be easily reinvested into quality of care, staff development, and sustainable growth.

If you're curious about how your costs stack up to these rates, you can use our interactive profit calculator to find out, available for free at www.birdie.care/resources/ebook/benchmarking-tool-2024

Download the tool here



1. Diversifying your revenue streams

Local authority funding has simply not kept pace with rising costs, creating a precarious situation for those providers who rely heavily on council contracts. Revenue diversification - the ability to build several different streams of income - isn't just a good idea for another day. It's essential for survival as a social care business.

How to assess your current revenue vulnerability

To determine how urgently you need to diversify, conduct this simple financial health assessment:

1. Calculate your current client mix percentage (local authority vs. private)
2. Determine your average profit margin for each client type
3. Project your financial position if local authority rates increase by only 2% and costs rise by 5-7%
4. Identify your financial breaking point – the point at which operations become unsustainable

“Competition is not always a good thing in a sector such as care. Faced with constant underfunding, it's not unusual for the NHS or Local Authorities to offer fees so low that care providers cannot afford to deliver a service that allows them to pay carers even the minimum wage.”

Amrit Dhaliwal, CEO and Founder, Walfinch

2. Adapting to changing client demographics

The UK's demographic landscape is shifting dramatically. The Office for National Statistics projects that by 2030, over 21% of the UK population will be aged 65+, with the most rapid growth occurring in the 85+ age bracket - precisely those most likely to require care services.

This generation also has:

- Higher rates of homeownership than previous or subsequent generations (approximately 76% of people over 65 own their homes)
- Access to pension wealth that previous generations didn't possess
- A strong preference for remaining in their own homes rather than entering residential care
- Families living further away, with adult children often willing to contribute to maintain their parent's independence

This creates a huge future demand for private care, with Local Authorities likely to struggle to foot the growing bill and more care recipients able to pay their own way.

We'll look at how to identify and approach these potential clients later in the book.

“The whole landscape of care is constantly changing. We (Christies Care) have moved in line with how our community has changed, from just providing live-in care to actively working within the community. It's essential to continuously adapt as a provider in order to keep providing the service our clients need.”

Charlotte Driver-Young, Operations Director, Christies Care

3. Addressing funding shortfalls

Local authority funding typically covers only basic care needs, leaving many clients with unmet needs that represent private opportunities. These can include:

- Companionship beyond essential care visits
- Accompanied shopping and social outings
- Meal preparation beyond basic nutrition requirements
- Extended personal care beyond allocated time slots
- Overnight support that falls below continuing healthcare thresholds

The irony is many of care providers would love to provide these kind of services - but without the autonomy to set rates and times for these services accordingly, it's nearly impossible to devote this level of care and attention to clients.

4. Sustainability and re-investment

Private client revenue doesn't just offer higher margins – it provides a much more stable form of funding, that allows for strategic business development and quality improvement. Once you can forecast, you can grow - and the financial flexibility created by a healthy private client base helps business grow in almost every area.

- Investment in staff training and retention strategies
- Technology improvements that enhance care quality and efficiency
- Marketing activities that attract additional private clients
- Development of specialised services that command premium rates
- Building operational reserves to weather future funding challenges

We'll explore some of the ways to re-invest later in this guide.

Convinced private clients may be able to help secure the future of your business? Read on for some hard truths about what private clients expect, how to meet those expectations, and how to secure long term business growth.

What private clients expect from providers

In the same way you expect a different service from an independent coffee shop than you do from a Starbucks drive-through, private clients usually have very different expectations than those accessing care directly through local authority channels.

Before you consider trying to grow your private client base, it's critical that you understand these expectations and feel confident that you can deliver on them.

The psychology of direct purchasing

When individuals or families pay directly for care, their mindset differs in several important ways:

- They perceive themselves as customers rather than service recipients
- They expect value demonstration rather than just service delivery
- They compare options based on a perception of quality rather than just availability
- They expect care to be tailored to their personal preferences
- They make decisions based on emotional as well as practical factors
- They expect to be able to see active change and improvement following a request or complaint



Providing an excellent client service

The most successful private care providers understand that emotional connection is as important as technical care delivery – and often becomes the deciding factor in client retention. Personal touches that create emotional connections include remembering and acknowledging important dates and milestones like birthdays or anniversaries, recognising preferences without being reminded, acknowledging life history and personal achievements, and creating moments of joy beyond task completion. For private clients, the logistics of care delivery are not just something they accept as read - they're essential components of a service that can significantly impact how happy they are and whether they'll recommend your service to others. Private clients typically expect:

- Greater flexibility in timing than LA-funded care allows

- Continuity and personalisation in care worker assignment
- Proactive problem-solving rather than reactive issue management
- Seamless administrative processes that don't burden the client/family
- Transparent visibility into scheduled visits and any changes
- Family access to scheduling information (with client consent)

“Transparency is key. I have a mobile number on my website that goes directly to me. If people know they can get the CEO's number, then they're reassured that you stand by what you deliver - even if they never have to call.”

Barry Sweetbaum,
CEO and Co-founder, SweetTree Connect

Three apps in one system

Why it matters

Managing your care business shouldn't mean juggling different systems for different users and different jobs. Our three purpose-built apps help care agencies, carers, and families stay connected and informed on every part of the process (from planning to paying, and everything in between).

What Birdie does for you

Your managers and coordinators can oversee every aspect of your business – from care planning to compliance – all in one place. With real-time alerts and comprehensive reporting, you can spot and solve issues before they affect your clients or your bottom line.

Empower your carers to deliver exceptional care

Put everything your carers need right in their pockets with the Carer App. They can access client information, complete tasks, record medications, and document observations with ease – even in areas with poor signal. The result? Less admin time, fewer errors, and more focus on what matters: providing quality care.

Keep families in the loop effortlessly

Stop fielding constant calls for updates. The Family App gives relatives secure access to care information, letting them check visit times, carer notes, and client wellbeing whenever they want. You can even track what percentage of clients have family members actively using the app, so you can identify opportunities to invite more relatives.





Supporting their whole world

The most successful private care providers understand that their role extends beyond direct care tasks to supporting the client's entire world. A comprehensive support offering for private clients often includes:

- Co-ordination with other services (cleaners, gardeners, handy people etc..)
- Management of household maintenance issues
- Pet care
- Technology assistance for communication and entertainment
- Liaison with community services and resources

This is also a brilliant way to build up a private client base as you can start delivering services early, that might then grow over time. Getting older and less independent doesn't (usually) happen overnight. So a way to bypass the stigma of receiving care is to provide a whole

range of services that family members and clients find easier to stomach, such as light domestic support or dog walking.

Once you are established in their household, it feels more natural to transition the services towards care as the client's needs grow. This approach also means having clients on the books for longer, which is another tick in the box for sustainable finances.

"It's really important to be a one-stop-shop for clients. When your client needs something, you want them to come to you. I remember one of our carers was telling us their client had been going on about the branches of a tree in her garden blocking the light, so we sorted a gardener for her. They never forgot that."

Grzegorz Wrzosek, Managing Director (Country Manager UK), Promedica24 UK Ltd

A happy, motivated team

The quality, strength, and motivation of your care team is the final differentiating factor in private client satisfaction and retention. Building and maintaining motivated teams requires deliberate strategies beyond basic employment. Private clients only want care workers who can:

- Demonstrate genuine empathy and emotional intelligence
- Show initiative in identifying and addressing needs
- Maintain professional boundaries while building personal connections
- Communicate effectively with clients, families, and other team members
- Demonstrate reliability and consistency in all aspects of service

Of course, it's no secret that the care sector has historically struggled to hire - however this is not always due to a shortage of good people, but more due to how attractive the sector is to a potential strong applicant. We'll look more at how to grow and sustain a motivated team later in the book.

Success means making a conscious, values-driven commitment to never compromise on quality standards. If that sounds like you, then you're in a good place to start growing.

Next, let's see how the above expectations play out in reality, with our first interview with a provider.



Interview with Charlotte Driver-Young, Director of Operations at Christies Care

Christies Care has been providing high-quality domiciliary care services to help the community for over 30 years. Twice rated Outstanding by CQC, Christies Care serve a mix of private and council clients.

1. What was the reason Christies Care began to focus on building a private client base as opposed to focusing more on local authority contracts?

Christies Care has always been driven by a commitment to delivering the highest standard of care – something we've found is best supported through a private client model.

By focusing on privately-funded clients, we're able to tailor care to everyone's needs and preferences, rather than being constrained by the rigid frameworks and limited budgets often associated with local authority contracts.

This approach allows us to offer truly person-centred care, delivered with compassion,

flexibility, and consistency, values that are at the heart of what we do.

2. In your experience, how can the expectations of private clients differ from those receiving council-funded care?

Private clients, and their families, often expect a higher degree of personalisation, responsiveness, and continuity. Many are seeking not just practical care, but also companionship, emotional support, and a sense of trust and dignity.

They may want more involvement in selecting carers, expect timely communication, and often value a relationship-based model of care where the carer becomes part of the client's life.

Council-funded care can be more task-focused due to time and funding limitations, whereas private clients tend to look for a holistic and lifestyle-oriented approach.

3. Do Christies Care teams receive any specific training, support or incentives to deliver on the higher expectations from privately paying clients and their families?

No, at Christies Care, we take pride in the depth and quality of our training and ongoing support. All carers complete our award-winning training programme, with an emphasis on communication, emotional intelligence, discretion, and client engagement. We empower our carers with the skills they need to adapt to a wide range of client needs, preferences, and personalities.

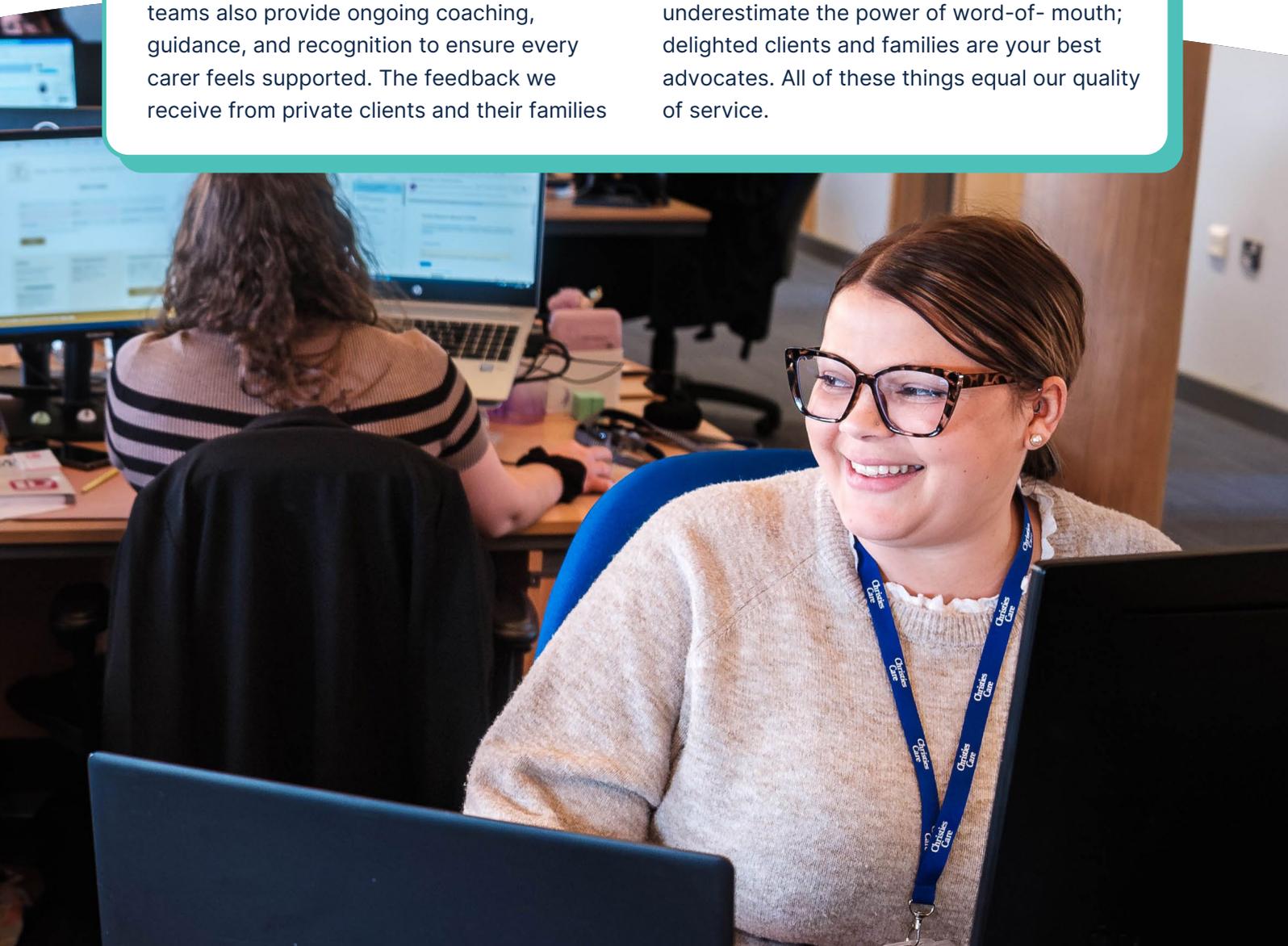
Our local area managers and central support teams also provide ongoing coaching, guidance, and recognition to ensure every carer feels supported. The feedback we receive from private clients and their families

often reflects this investment in training and development.

But overall, there is no difference in the level of outstanding care, all our clients receive the same quality care.

4. What would you recommend as the most important thing to consider for any care organisation looking to build a private client base?

Trust is everything. When families are choosing care privately, they're placing immense trust in your organisation; so consistency, transparency, and genuine human connection must be prioritised at every stage. It's also vital to invest in your people: from recruitment and training through to ongoing support and development, your carers are your greatest asset. Never underestimate the power of word-of-mouth; delighted clients and families are your best advocates. All of these things equal our quality of service.



The first steps to building a private client base

1. Define your unique service proposition

In a crowded marketplace, being clear about what makes your service different is essential. This isn't just about having a good website or a nice logo - it's about truly understanding what your team is best at, what it's weakest at and knowing the same for your competitors.

Only once you have that clear picture does it become easier to stand out from the crowd, and create a flow of happy private clients.

How to identify strengths and weaknesses

1. Conduct a comprehensive SWOT analysis

- Gather your team together for a brainstorming session
- In that session, list all your possible **strengths, weaknesses, opportunities, and threats**. For example...
 - A strength could be 'experienced team'
 - A weakness could be 'tight financial margins'
 - An opportunity could be 'established local business'
 - A threat could be 'mixed reputation in the community'

Once you know your strengths, prioritise and rank order the most significant strengths you have by scoring each out of 5.

2. Validate your findings through stakeholder feedback

- Reach out to any existing clients, family

members, and professional contacts you have in the industry

- Ask specific questions about what they value most about your service - you can use the SWOT analysis to help inform what these questions are.
- For example 'How do you perceive the level of experience in our team? Rate 1-5, with 1 being 'Not experienced' and 5 being 'Highly experienced'
- Use those findings to inform your own SWOT analysis and get a clearer picture of how you're viewed externally

3. Analyse your competition

- Mystery shop your competitors by calling as a potential client, or asking a trusted person to enquire on your behalf. Don't lead the competitor on though! Just take the conversation to the point of an initial enquiry, and document the process and support received.
- Review their marketing materials and

online presence. Look out for things that you find confusing or difficult to navigate, such as broken links on a website, as you can then resolve to make sure those don't appear the same way on your website. Additionally, if you see them doing something you like then make a note and see if you can emulate it yourselves.

- Using your mystery shopping and online research, create a comparison chart of services, pricing, and unique offerings for you and your competitors.
- Use that chart to identify gaps in the market where you may be stronger or able to provide a unique service that competitors simply don't offer. Refer to the list of services you are able to provide at the start of the guide if you're stuck for inspiration!

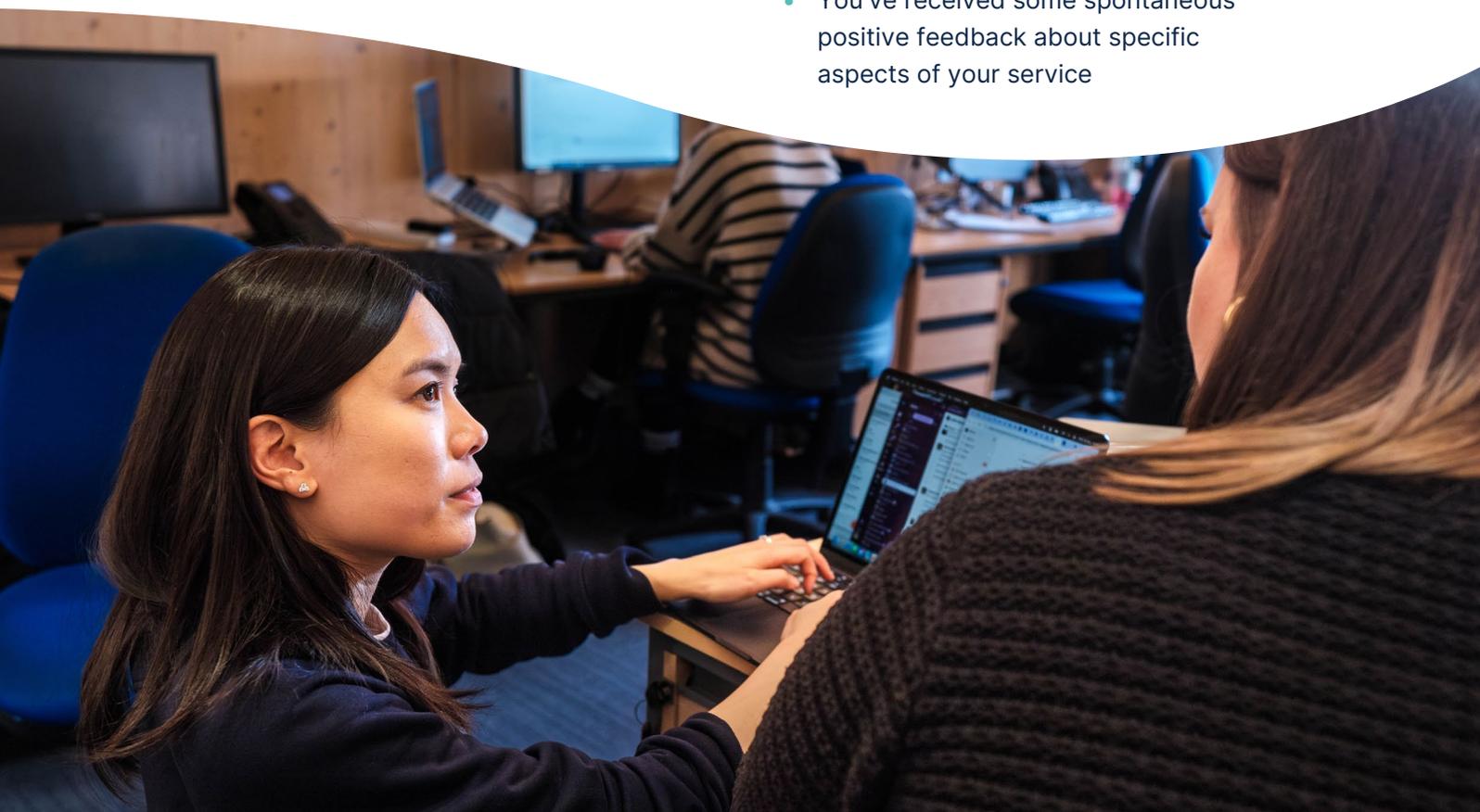
4. Test your assumptions

- Create different value proposition statements based on your findings. These are short and snappy statements that aim to sum up the unique value your business provides.

- For example: 'We are a small but highly experienced team of local social care professionals, with decades of combined experience supporting the community' or 'We provide a wide range of services that you won't find elsewhere, covering all our clients needs to ensure they live longer, happier, and more fulfilling lives in their own homes'
- Share these statements with a small group of trusted contacts
- Ask them to rank the statements in order of appeal to them, and explain their reasoning

Once you've compiled this information, look for patterns and consistent themes. Your unique strengths will likely emerge from areas where:

- Your team's internal assessment aligns with external feedback
- You have some capabilities, services, or skills that are less common among local competitors
- You've received some spontaneous positive feedback about specific aspects of your service



Creating your Unique Selling Proposition (USP):

With your validated strengths identified, it's time to craft a clear, concise statement that:

1. Identifies the specific client need you address
2. Explains how you address it differently or better than alternatives
3. Provides evidence of your capability to deliver

For example: 'We specialise in supporting individuals with early-stage dementia to maintain independence at home, using our

team's specialised dementia care training and flexible visit scheduling to adapt to changing needs as they arise.'

Document your new USP in a one-page brief that includes:

- Your core proposition statement
- 3-5 supporting points that provide evidence to this statement
- Client testimonials that validate your claims (once you have them!)
- A clear explanation of how this translates to client benefits

“Work with absolute integrity. Know your worth and who you are. Know what your specialism is and stick to it. People will remember when you act true to yourself, and they'll also remember when you claim you're something that you're not.”

- Claire Reader, VP of Community Services, Newcross Healthcare Solutions



2. Understand your private client's world

It's time to establish your local private client landscape. Where they are most likely to live, how decisions about their care are made, and what they're looking for in the ideal care provider. This information will be the second piece of the puzzle when it comes to thriving as a private homecare provider.

1. Gather demographic data

- **Get the age ranges of typical older adults in your area**
Request anonymised data from your local authority's adult social care department for this - you can also check the Office for National Statistics (ONS) website for demographic breakdowns by postcode. Consider joining local care provider networks where this information is also often shared.
- **Understand the local income and asset levels needed to afford private care**
Calculate your hourly/package rates, and compare them to the local average pension incomes (also available from ONS) - you're looking for your costs here to be appealing but robust, around 15% of a standard yearly pension income. For more help on this, contact financial advisors who specialise in later-life planning as they often have insights on local affordability thresholds.
- **Housing types and locations where private clients typically live**
Use property websites like Rightmove and Zoopla to analyse housing types and values in your service area. Create a simple map highlighting areas with higher concentrations of bungalows, retirement communities, and accessible housing - these are likely to be your hotspots for new clients.

- **Family structures (nearby relatives, distance caregivers, etc..)**

Include questions about family support in your initial assessment forms. Analyse patterns from your existing clients and consider speaking with local community organisations that support older adults.

2. Identify psychographic characteristics

- **Values and priorities regarding care (independence, dignity, continuity)**
Create a short survey for current clients and their families that asks them what they want most from a care provider. Consider holding small focus groups with existing clients who are willing to share their perspectives. Online reviews of other care providers can also reveal common values.
- **Decision-making processes for care services**
Document any repeated questions and concerns raised during initial consultations. Track how long potential clients typically take to make decisions and who is involved in making a final call (client themselves, adult children, GP etc..).
- **Common concerns or objections to home care**
Keep a record of reasons given when prospects don't proceed with your service. Use this to create a 'concerns checklist' based on patterns you observe.

- **Information sources they trust**

Ask new clients directly how they researched their care options. Monitor which of your marketing channels tend to generate the most enquiries (website, local newspaper, GP referrals, etc..). Review competitors' marketing to see where they're investing, as they may be onto something you're not yet!

- **Note common questions asked during initial enquiries**

Keep a running document of all questions asked during enquiries and organise them by frequency. Train your staff to document these questions they receive during the initial contact.

3. Analyse your existing client base

- **Review characteristics of your current clients who are most satisfied**

Implement a simple satisfaction rating system and correlate high scores with client characteristics. Use this to look for patterns in service types, frequency of care, and communication preferences among your happiest clients.

- **Identify patterns in how they found you**

Include a mandatory "How did you hear about us?" field on your enquiry form - and then cross-reference this with your most successful client relationships to identify your most valuable marketing channels to invest in.

- **Determine what aspects of your service they value most**

Conduct quarterly check-ins with clients that include specific questions about what they appreciate the most about your services. Create a simple ranking exercise where clients can prioritise different aspects of your service. Monitor what clients mention most often in positive feedback.

Sum up all your findings into 2-3 detailed client personas

A persona is something that many businesses use to maintain a focus on who their target audience is, so they don't waste time and effort trying to get the attention of someone who doesn't require or want their services. It's essentially a short description of a made up individual, who embodies all the qualities your target audience would have.

For example:

"Margaret, 83, recently widowed, values independence but has increasing mobility issues. Her adult children live 50 miles away and are researching care options. Primary concerns are reliability and trustworthiness of carers."

"David, 76, former business owner, managing early Parkinson's. Wants to maintain his active lifestyle but needs increasing support. Values professional, punctual service, and is willing to pay premium rates for high quality."

The key things to include for your new private care personas are...

- A name and basic demographic profile
- Their needs, values, concerns, and decision-making process
- Quotes that represent their typical language and priorities
- Where and how they would search for care services

Once you have them, keep these personas visible and refer to them when making decisions about your services, pricing, and marketing strategies.

3. Get your private pricing structure right

The power is in your hands to now set a pricing structure that works for your business. However, it still has to work for your local area and the private client base you're working with as well. Let's look at how to determine what the right price is for you.

Conduct thorough market research:

1. Survey the current local market

- **Call competitors as a potential client to gather pricing information**
Don't overdo this, as you'll risk blowing your cover and upsetting your local community.
- **Request information packs from other providers**
Or use their website to gauge pricing where possible.
- **Review published rate information on care directories**

We recommend www.homecare.co.uk or www.peopleplaceslives.co.uk to understand where you stand in the market.

2. Analyse your own pricing structures

- **Establish your baseline hourly rate for standard care**
Calculate your total operational costs per billable hour (carer wages + employer costs + overhead + travel time). If you create a simple spreadsheet with some basic formulas then you can adjust different variables (wage increases, overhead changes) to see how they affect your hourly rate and current minimum requirements.

(Or just use the Birdie benchmarking tool below to help achieve this result faster!)

- **Calculate your minimum viable price based on costs and desired margin**
Add up all direct costs (staff wages, NI, pension contributions, training) and indirect costs (office, administration, insurance, CQC fees). Use this formula: $\text{Minimum price} = \text{Total costs} \div \text{Billable hours} \times (1 + \text{desired profit margin})$.
- **Position your price point relative to competitors based on your USP.**
Create a competitor analysis spreadsheet where you list each competitor's price and key features. Now, combined with your USP work, it's time to decide whether to position as premium (higher price, superior service), mid-market, or value option based on your USP strengths.

There is a fantastic free tool available at www.birdie.care/resources/ebook/benchmarking-tool-2024. Using industry-wide data, this FREE Birdie tool will securely take numbers and tell you:

- If you're spending more, less, or the same than the average on everything from per-hour pay to travel time
- If your profit margins per hour of care are beating your competitors
- Exactly where you need to make savings or efficiencies in order to improve the health of your business



3. Understand client perceptions

- **Conduct informal interviews with potential clients about price expectations.**

Write up some open-ended questions about care costs. Approach potential clients at community events, partner with local senior centres to host informational sessions, or offer free care consultations where you can naturally discuss pricing expectations using these questions.

- **Research how any existing clients perceive value in homecare.**

Create a simple survey asking your clients to rank different aspects of care (reliability, consistency of carers,

communication, etc..) in terms of what they'd be willing to pay more for. You can also analyse online reviews of competitors to identify what clients mention positively in relation to price!

- **Track at what price point potential clients tend to hesitate or seek alternatives.**

Create different care packages at various price points and monitor which generate the most interest. Test small price increases with a subset of new clients to determine the elasticity of demand in your market. Follow up with prospects who didn't convert specifically to understand if the price was the barrier, or if it was something else.



Develop your ideal competitive pricing approach

1. Strategic introductory offers

- **Experiment with some time-limited introductory rates that encourage new clients**

Calculate the maximum discount you can potentially offer while covering your costs - for example, '15% off your first month of care' or 'Free care assessment and care plan development'. In doing this, create a financial model showing how many trial clients must then convert to regular service to make the promotion profitable.

- **Test to find the perfect balance that works for you**

Compare the financial impact of percentage discounts versus free add-on services. Create tracking codes for different promotions to measure their effectiveness. Set clear parameters (minimum hours, service duration) to ensure the promotion attracts your target clients.

2. Loyalty and volume incentives

- **Develop a transparent discount structure for higher weekly hours**
Calculate the cost efficiencies you gain with higher-hour packages (reduced travel time, simplified scheduling). Create a sliding scale showing exactly what discount applies at different hour thresholds.
- **Create loyalty programmes that reward long-term clients - such as '5% reduction after 6 months of continuous service'**

Calculate the value of client retention (reduced marketing costs, training efficiency). Define specific loyalty benefits that don't erode your margins

(priority scheduling, free quarterly care reviews). Create anniversary recognition moments that acknowledge client loyalty. Set up automatic alerts in your system to identify clients approaching loyalty milestones. Create a formal communication process for introducing the loyalty discount. Track the impact of loyalty discounts on client retention to measure ROI.

3. Flexible payment options

- **Offer payment plans for private clients who still need budgeting assistance**

These can include staggered payments, with or without interest - or you could even consider partnering with specialist financial services for care funding, who may be able to help you and your more cash-strapped clients keep care going.

- **Consider pre-payment discounts for advance commitment**

Before doing this, always calculate the cash flow advantage of pre-payments to determine appropriate the discount levels. Once you have a set of terms you're happy with, create simple contracts that protect both parties in pre-payment arrangements. Finally, set up proper accounting procedures to manage pre-paid care hours and avoid any missed discounts/unhappy clients.

- **Accept multiple payment methods to reduce barriers**

Research transaction fees for different payment methods to ensure they're financially viable for your business - and once you're happy, it should be fairly straightforward to set up secure systems for processing various payment types such as Apple Pay, direct debit, transfer etc.. Create clear instructions for each payment method to share with clients and families.

4. Communicating your pricing strategy:

Create a clear, professional pricing document that...

- **Explains your value proposition first.** This is a concise paragraph highlighting your key strengths and differentiators. Include testimonials from satisfied clients that emphasise value rather than price. Use professional design elements that reflect quality and reliability.
- **Presents pricing in a clear, easy-to-understand format.** Include visual elements like tables or charts that make comparisons easy. Have several non-industry people review the document to ensure it's free of confusing jargon.
- **Highlights what's included in your rates.** Create a comprehensive 'What's included' section that details all components of your service. Consider using checkmarks or other visual indicators to emphasise inclusivity - and if you're feeling feisty, contrast your pricing with common 'extra charges' that competitors may add.
- **Addresses common concerns (e.g., 'No hidden costs').** You should have a list of common client objections from your previous research. Create direct, transparent responses to each concern, best included in a FAQ section that proactively addresses these issues.

- **Explain how your pricing compares to funded care options.** Research current local authority funding rates and eligibility criteria. Create a simple comparison showing the difference in service levels between funded and private care. Provide information on financial assistance options for those who may qualify.

“Ultimately, a care company that goes bust does not serve anyone. That’s why the best business owners have a magic mixture of compassion and smart business skills. In today’s tough market, a lack of business and financial skills is a serious failing that could kill off even the most compassionate care business.”

Amrit Dhaliwal, CEO and Founder, Walfinch

4. Making a good first impression

Your website is typically the first contact potential clients or their families will have with your service. Taking the time to create the right impression is critical to converting a casual look into a serious enquiry. The best private client-focused websites often have the following features:

- Clear articulation of service differentiation (your USP)
- Evidence of reliability and trustworthiness (real testimonials, real photography)
- Emotional reassurance before technical capabilities (speaks the client and families emotional language)
- Visual representation of care quality and approach (simple infographics)
- Simple pathways to initial contact (a booking form, a phone number, an email)
- Mobile optimisation

You'd be surprised how easy it is for a potential client to give up on an enquiry based on your website. To ensure your site is not letting you down, try enlisting the help of volunteers to test the site and provide feedback.



It is much easier to do this if you create a basic tick list for them to follow. Here is a suggested list you can copy and share with your website testers - and use yourself to make sure your website is looking its best!

Basic technical tests:

- Website opens correctly on a computer browser (try Chrome, Firefox, and Edge)
- Website opens correctly on a mobile phone (both iPhone and Android if possible)
- All pages load within a few seconds
- Contact form submits properly and sends a notification to the team
- Phone numbers are clickable on mobile devices
- All links work (no broken links or "404 errors")
- Text is readable without zooming (especially on mobile)

Content and messaging

- Our services are clearly listed on the homepage
- Our care specialties are easy to find (e.g., dementia care, personal care)
- Basic information about staff qualifications/training is available
- Pricing information or guidance is easily findable
- Our contact information is visible on every page
- There's an "About us" section that explains our company values and why we're different
- Our geographical service area is clearly stated

Enquiry generation

- Contact information is prominent (ideally in the header/footer of every page!)
- There's a clear call-to-action button that works (e.g., "Request a care assessment")
- The website includes a simple enquiry form
- There's information about what happens after someone makes an enquiry
- Testimonials from satisfied clients are featured on the website
- The website explains the benefits of choosing our service (our USP)

Trust and credibility

- There are professional photos of real staff (not just stock images)
- We have client testimonials with first names (and locations if possible)
- Our accreditations and memberships are displayed (e.g., UKHCA membership)
- We have clear information about how we ensure quality care
- Relevant insurance information is mentioned
- Our privacy policy and terms of service are clearly available
- The website has been updated recently

User experience

- Website design looks professional and appropriate for care services
- Navigation menu is easy to understand
- Font size is large enough for older visitors to read easily
- Good contrast between text and background
- Photos load properly and aren't distorted
- Minimal pop-ups or distractions
- Location/address is easy to find with a map if applicable

Final questions for them to fill in as they want:

- After looking at the website, do you understand what services we offer?
- Would you know how to contact us based on the website?
- Does the website make you feel our service is trustworthy?
- Can you find information about our care approach?
- Is there anything missing that would help you make a decision?

**The foundation has now been laid for success.
Time to build momentum!**



Building momentum through marketing

The foundation of your private client strategy has now been set up. You have a clear understanding of who your private clients are, what they expect, and how to structure your service offering so it works for them and you. Now let's get the clients coming to you with a robust marketing strategy.

Marketing is the bridge between your business and the people who want and need your services. Without building a good strong bridge, building a private client base is going to be much harder.

The way to build this bridge is a 'multi-channel strategy' - and this chapter will unpack how to get it done.

What is a multi-channel strategy?

Let's start at the beginning with what a channel is. A channel, in the context of marketing, is a way that you can reach your potential audience. Therefore your website is a channel - as is social media, email, flyers, adverts in the local newspaper, a singing telegram etc.

There are a number of different marketing channels likely available to your business right now.

- **Digital channels:** Your website, social media, email, search engine visibility
- **Traditional media:** Local press, community magazines, radio
- **Community presence:** Events, partnerships, networking
- **Direct channels:** Mail, leafleting, outdoor advertising
- **Referral networks:** Professional and client-based

Each channel has its unique strengths. For example, your website acts as a 24/7 information hub, while social media provides opportunities to demonstrate your humanity and values. Traditional media (such as newspaper ads) often carries more inherent trust for older audiences than digital platforms, but may be seen by less people.

Face-to-face interactions also play a key role in creating the personal connections that are so important in care decisions.

Each of your marketing channels are like instruments in an orchestra - each has its own unique sound, but together they can create something more powerful than any single instrument could do on its own.

The most successful private care providers understand that potential clients and their families will typically encounter your service multiple times, through different channels, before making a decision. This is actually particularly true for care services, where the stakes are high, and trust is paramount.

A typical client journey through your channels might look like this:

- Reads the flyer that came in their letterbox before throwing it away
- Sees your Facebook post about supporting people with dementia
- Later notices your leaflet at a local GP surgery
- Receives a recommendation from a friend or professional contact
- Visits your website to learn more about your services
- Finally makes contact after seeing one of your care team leaving a neighbour's house

Each of these touchpoints builds confidence and familiarity, ultimately leading to an enquiry. For private care clients, this journey is rarely linear. They may start researching options months before they actually need care, collecting information and forming

impressions that will influence their decision when the time comes.

How to develop a multi-channel approach

A multi-channel approach means making use of the full 'orchestra' of your marketing channels. It starts with understanding what channels are available to you, which of those you should prioritise, and the best ways to use each channel in order to get the most enquiries.

Let's break down how to create a multi-channel approach that actually works for your care business, especially if marketing isn't your area of expertise.

1. Take stock of what you've got to work with

- **Look at your current team:** Who's good at what? Maybe Sarah in the office is brilliant with social media, or John has great connections in the community. Start by recognising the talents already on your team.
- **Remember what's worked before:** Think about how you've found clients in the past. Was it through community events? Word of mouth? Those leaflets you distributed last year? Make note of what's already bringing (or originally brought) people to you.
- **Be honest about what you're not good at:** If nobody on your team understands TikTok, or writing press releases feels overwhelming, acknowledge these gaps.
- **Think about money realistically:** You don't need a massive budget, but be honest about what you can spend each month on your marketing without giving yourself a financial headache.

- **Consider your time constraints:** Running a care business is demanding! Be realistic about how many hours weekly you and your team can dedicate to marketing without compromising care quality.

2. Think about your client's journey to finding you

- **Getting on their radar:** How can people first hear you exist? This might be through local newspaper ads, community notice boards, or seeing your care workers in their branded uniforms around town.
- **Building trust gradually:** Once they know you exist, how will you help them learn more? Perhaps through free information sessions, helpful articles on your website, or an open office event.
- **Making it easy to reach out:** When someone's ready to talk to you, how will they contact you? Is your phone number prominently displayed? Is the contact form on your website working? Could someone with limited tech skills navigate your website?

3. Bringing it all together seamlessly

- **Keep your story consistent:** Make sure your brochures, website, and what you say in person all tell the same story about your care service - taking into account your USP. If your leaflet emphasises family involvement but your website doesn't mention it, that creates confusion about why someone should use your services.
- **Connect the dots:** When someone calls, always ask "How did you hear about us?" and record it. This simple question helps you understand which marketing efforts are working.

- **Play to each channel's strengths:** A general rule of thumb is to use social media like Facebook for sharing warm client stories and community updates, your website for detailed service information, and in-person events for making personal connections.

- **Define what success looks like:** For each marketing activity, decide what would make it worthwhile. Is it generating three new enquiries a month? Getting 10 people to attend your information session? Having specific goals helps you know what's working.

- **Try, learn, and adjust:** Start small with new marketing ideas, see what happens, and be ready to change course if something's not working. Marketing is often about experimenting to find what works for your specific community, then sticking with what works for you.

Create a simple "Marketing channel planner" to tie all of the above together - even if it's just a page in a notebook or in a spreadsheet. For each marketing activity (like your Facebook page, local newspaper ad, or community presentations) write down:

- **What's the main purpose of this activity?** (Making people aware we exist? Building trust? Encouraging contact?)
- **Who exactly are we trying to reach with this?** (Adult children of elderly parents? Seniors themselves? Local healthcare professionals?)
- **What specific content will we share here?** (Client stories? Care tips? Service details?)
- **How will we know if it's working?** (Phone calls? Website visits? Enquiries mentioning this source?)

Review this planner every three months and be honest about what's bringing in clients and what's not making much difference. This helps you focus your limited time and budget on what actually works for your care business.

“The key is to not be in it for you, but be in it for them. Understand your audience’s problem, think about ‘how can I solve your problem’, and it will get you in that door.”

Grzegorz Wrzosek, Managing Director
(Country Manager UK), Promedica24 UK Ltd

The importance of tracking your leads

A ‘lead’ is a potential client that has come directly to your business.

In care, it’s all too easy to lose track of these leads - you get a promising phone call from someone interested in your services, you have a great conversation - then a rostering or medication emergency arises, work piles up, and suddenly it’s been two weeks since you promised to send them an information pack. In that time the potential client may have already gone elsewhere.

This is why tracking your leads is so crucial. Lead tracking acts as a safety net to catch every person who reaches out to you, ensuring no one falls through the cracks when they need your help. Without a simple system to manage leads, you’re essentially throwing away all the hard work you’ve put into your marketing. There’s a wide range of software available just for this purpose (such as Hubspot, Zoho, and monday.com) but even

the most basic system using a spreadsheet and calendar allows you to...

- **Never forget a follow-up:** When Mrs. Jones calls about care for her father, a system will remind you to call her back on Thursday as promised, even when you’re juggling a dozen other priorities.
- **Nurture relationships at the right pace:** Not everyone needs care immediately. Some families are researching options months in advance. Your system helps you keep in gentle contact, sharing useful information until they’re ready to make a decision.
- **Figure out what marketing actually works:** You might discover that your expensive newspaper ad generates lots of calls but few clients, while your community presentations bring in fewer enquiries but they almost always become clients. This insight helps you spend your marketing budget more wisely.
- **Spot and fix problems in your process:** Perhaps you notice that lots of people request information packs but few book assessments afterward. This might signal that something in your information pack needs improving.
- **Show the real value of your marketing efforts:** When your boss or business partner questions the money spent on marketing, you’ll have solid numbers showing how many new clients (and how much revenue) those activities generated.

The best approach combines organisation with genuine care. You want to be thorough without feeling robotic – after all, you’re helping people make important decisions about their loved ones’ care.

Getting started with lead tracking

You don't need expensive software or technical skills to get started with lead tracking. As you grow more in confidence, software can help you grow even faster - but these points below will remain the same.

1. Choose a tracking method that works for you

The key is choosing something your team will actually use. A perfectly maintained notebook is far better than a neglected high-tech system.

- **If you prefer paper:** Start with a dedicated enquiry notebook where you log calls and next steps. Add calendar reminders for follow-ups.
- **If you're comfortable with basic computer tools:** A simple spreadsheet works well for most small scale care businesses.
- **If you're ready for more:** Look at a simple CRM (customer relationship management) tool like Hubspot's free version, moving onto paid when you're sure you will use it.

2. Create a simple process everyone can follow

- **Decide who does what:** Who answers initial calls? Who sends out information packs? Who follows up on the enquiry, and when? Make responsibilities among yourself and your team crystal clear.
- **Set response timeframes that show you care:** A good rule of thumb is that phone calls are returned within 3 hours, emails by the end of the day, and information packs sent within 24 hours.

- **Create templates for common situations:** Draft simple email templates for frequent scenarios like "Enquiry but not ready yet" or "Needs financial assessment first" so your team can respond quickly and consistently. Store these email templates in what ever system you are using to track leads.
- **Plan your follow-up sequence:** This could be an initial call, then an information pack, then a check-in call three days later, then a gentle monthly keep-in-touch email for those not ready yet.
- **Make handovers smooth:** Ensure whoever handles initial enquiries passes complete information to whoever conducts assessments, so families don't have to repeat their story.

Here is a template you can use to lay out your process:

- **Person's name:** Who made the enquiry?
- **Their contact details:** Phone, email, and address
- **Date they reached out:** When did they first contact you?
- **How they found you:** Which marketing channel brought them to you?
- **What they need:** Brief notes about their care requirements
- **Current status:** Enquiry, information sent, assessment scheduled, etc.
- **Next step:** What needs to happen next?
- **Who's responsible:** Which team member owns this next action?

- **Deadline:** When must this next step happen by?
- **Notes:** Any important details to remember

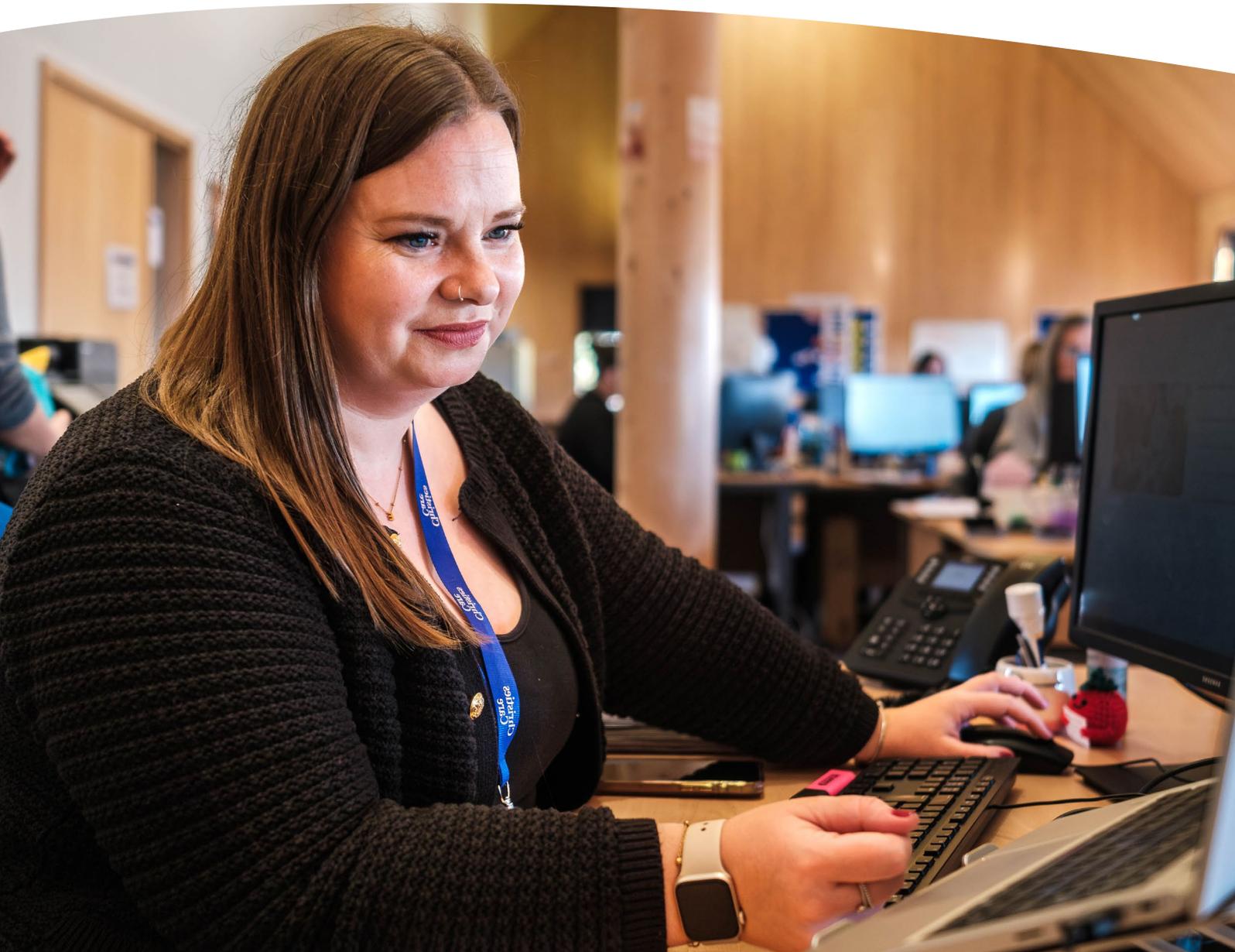
3. Keep improving your approach

- **Schedule a monthly 30-minute review:** Look at your enquiries, conversion rates, and any patterns or issues.
- **Create simple reports you'll actually use:** Track basics like 'number of enquiries', 'source of enquiries', 'conversion rate to assessment', and 'conversion rate to client'.
- **Address problems quickly:** If you notice certain types of enquiries aren't converting, brainstorm why with the team and test improvements.

- **Celebrate successes:** When your team successfully nurtures a difficult enquiry into a happy client, recognise and learn from that success.

- **Share responsibility:** Make lead management everyone's concern, not just one person's job.

Remember, underneath all this tracking are real people making difficult decisions about care. When someone calls about care services, they're often worried, uncertain, and sometimes in crisis. Your tracking system is there to help you be more responsive and supportive, not to turn people into numbers.



What if I don't have a CQC rating yet?

Not having a rating can make acquiring private clients particularly tricky - as the more savvy among them will know to look for a CQC rating on your website, and might immediately reject you if they can't spot it.

This is where you can actually use your care management software to your advantage - and, in particular, where using Birdie can mark you out as a top-tier provider even without a CQC rating. We can do this using something called 'The Q-Score'.

The Q-Score

The Q-Score is a tool that's unique to Birdie's smart homecare technology. It takes the data that your entire business is adding to the system daily, and shows you exactly how you would fare against CQC standards.

You receive your unique monthly Q-Score direct to your email inbox:



The total score is always out of 4 - with each number matching the CQC's own ratings (1 = Inadequate, 2 = Requires improvement, 3 = Good, 4 = Outstanding).

This final score is made up of at least 13 different reports. Each of these reports are focused around the areas that the CQC would be using to rate your business. For example:

- Call Monitoring
- Care Planning
- Caring Staff
- Medication Monitoring
- Alert Responsiveness



The way these reports are clearly structured, and the guidance the reports provide to help you easily meet CQC standards, mean you can put effort in just the right places and prevent issues becoming problems that can inhibit performance and growth.

Check out this [case study](#) with Outstanding provider Christies Care on how they use their Q-Score to maintain their rating



How can your Q-Score be used to reassure potential private clients?

In lieu of a rating, you can share your Q-Score with potential private clients, using the following copy as a guideline:

“While we’re awaiting our first CQC inspection, we use advanced care management technology that helps us monitor and maintain high standards of care. This system:

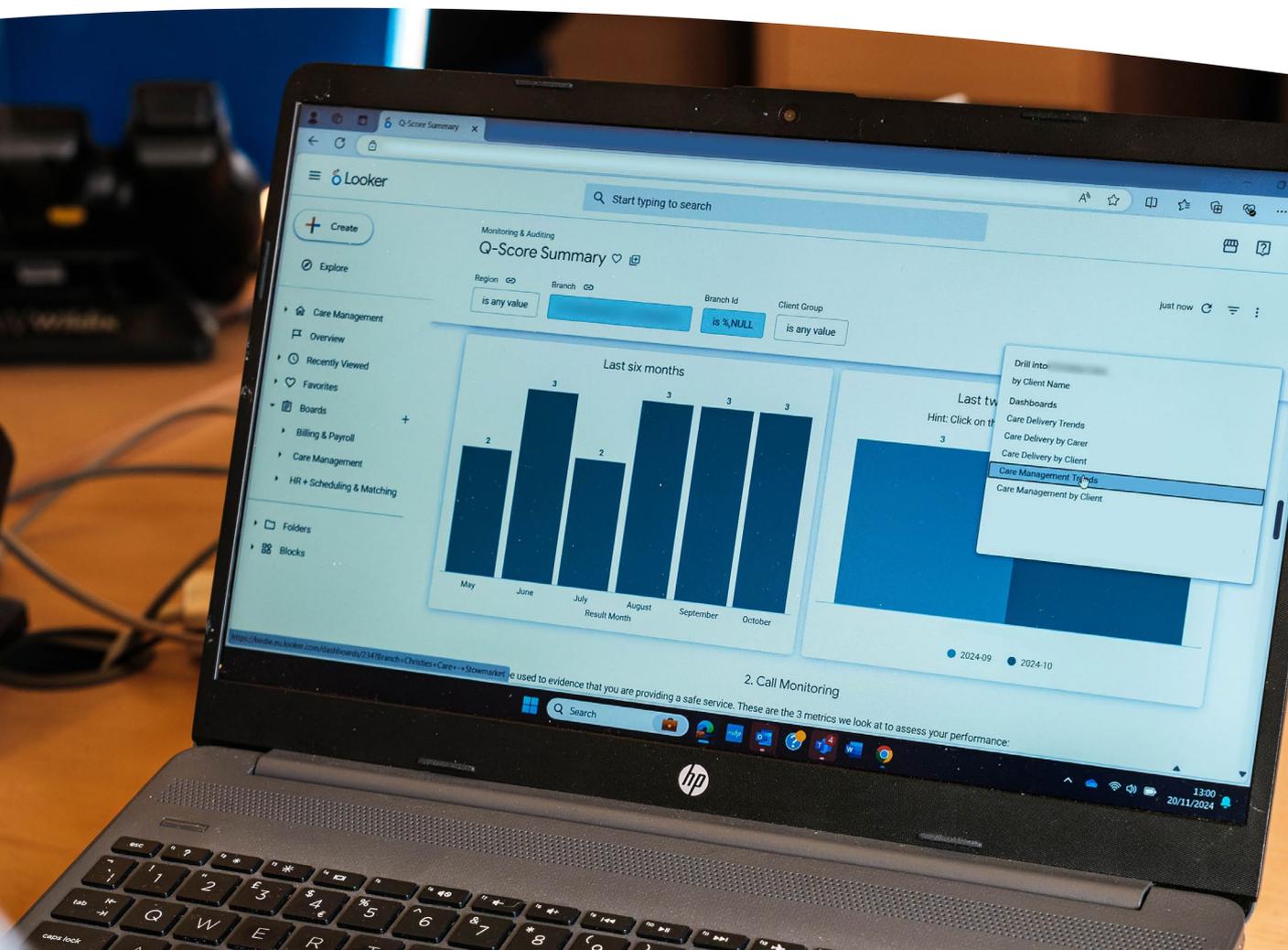
- Tracks every aspect of our care delivery in real-time
- Alerts us if any issues need attention
- Helps us maintain detailed records of all care provided
- Enables continuous quality improvement
- Allows families to stay connected through dedicated apps

The system we use also has a tool called the ‘Q-Score’, or Quality Score. This Quality Score turns all the information we capture as we deliver care to our clients, and generates a final score of 1-4 - with 1 reflecting we need to do better, and 4 showing that we’re properly caring and supporting all our clients. This score shows what the CQC are likely to rate us as when the inspection backlog is cleared.

We’re proud to say our score is currently ‘X’, which puts us as likely to have an ‘X’ rating at CQC.

Your safety, happiness, and success is our priority!”

Frustrated waiting for a CQC rating? Book a free chat with Birdie and see how smart technology can help you deliver an incredible business today:
www.birdie.care/book-a-demo



Referral partner networks for strengthening your private client base

Why has this got its own chapter? Because word of mouth remains the most powerful marketing channel in care services. When someone is looking for support for themselves or a loved one, a recommendation from a trusted source carries more weight than any advertisement or brochure. This is where referral partnerships come into play, creating a system to generate trusted recommendations for your service.

What is a referral partner network?

Referral partnerships represent one of the most cost-effective and powerful channels for private client acquisition, leveraging established trust relationships to generate high-quality leads. Unlike traditional marketing, which requires you to build trust from scratch, referral partnerships allow you to 'borrow' the trust that already exists between the referrer and the potential client.

When a solicitor, financial advisor, or healthcare professional suggests your service to their client, that recommendation carries the weight of their existing relationship. The potential client approaches you with a foundation of trust already established, significantly increasing the likelihood of conversion.

A proactive, positive referral practice benefits everyone involved:

- **Clients** receive vetted, trusted recommendations at a time of need
- **Referral partners** enhance their own service by offering valuable connections
- **Your business** receives pre-qualified leads with higher conversion potential
- The referral dynamic creates a foundation of trust before the first contact

The power of prioritising a referral network

The strategic importance of referral networks extends far beyond simply generating leads. A great referral network fundamentally transforms the economics and quality of client acquisition. While all marketing channels have their place and benefit your business in different ways, few can match the efficiency and effectiveness of a well-developed referral network!

Referral-generated clients typically deliver:

- **30-50% higher conversion rates** compared to traditional marketing
- **20-40% lower acquisition costs** per client
- **15-25% longer client retention** periods
- **10-20% higher average revenue** per client
- **Significantly higher levels** of initial trust and cooperation

The economics are compelling: a referred client typically costs less to acquire, stays with you longer, and generates more revenue than clients sourced through other channels.

Consider the lifetime value of a typical private client. If they remain with your service for

an average of 18 months at £25 per hour for 10 hours weekly, their total value exceeds £19,000. Reducing acquisition costs while increasing conversion rates and retention periods can significantly enhance the profitability of your private client service.

Who makes up a referral network?

A referral network for care providers typically includes:

- **Professional services:** solicitors, financial advisors, accountants
- **Healthcare providers:** GPs, hospital discharge teams, community nurses
- **Community organisations:** faith groups, seniors' clubs, community centres
- **Complementary service providers:** home help, gardeners, meal providers
- **Existing clients and their families**

Each type of referrer has different motivations and concerns. Professional services and healthcare providers want confidence that they're recommending a reliable, high-quality service that will reflect well on them. Community organisations prioritise the wellbeing of their members. Complementary service providers look for reciprocal relationships that benefit their own businesses. We'll look further at how to find, engage, motivate, and track the success of your referral network in this chapter.

The partnership prioritisation framework

Not all potential referral partners will bring you the same number of clients. Some might send several new clients your way each month, while others might refer just one or two a year.

When your time and energy are limited, you need to be smart about where you focus your relationship-building.

Think of it like tending a garden - you want to give the most attention to the plants that will produce the most fruit, while still making sure the others get enough care to thrive. Without this thoughtful approach, you might find yourself spending hours nurturing relationships that bring little return, while neglecting those with huge potential.

The goal is to build a diverse network of referral partners who together provide a steady stream of suitable clients for your service. This means taking a step back, looking at all the potential partners in your area, and making conscious decisions about who to prioritise.

A helpful way to think about your potential partners is to group them into three categories:

- **Volume partners:** These are your VIPs - the people and organisations likely to send you several ideal clients each year. Think hospital discharge teams in your area, busy GP practices, or solicitors specialising in elder law.
- **Regular partners:** Your solid regular supporters - they refer moderate numbers of clients or perhaps clients who need less intensive care packages. These might include community pharmacists, retirement community managers, or financial advisors.
- **Occasional partners:** Occasional referrers who might send the odd client your way. This could include solicitors, estate agents, or community group leaders who occasionally encounter someone needing care.

This simple system helps you decide where to invest your relationship-building time. Your Volume partners might warrant monthly face-to-face meetings and extra attention, while your Occasional partners might just receive quarterly update emails and occasional check-ins.

Remember though, partners can move between categories! A religious minister you classified as an Occasional partner might suddenly become very active in referring clients if they start running a seniors' group. Meanwhile, a Volume partner might change roles or focus and refer fewer clients. That's why it's worth reviewing your classifications and moving people/businesses every few months.

How to identify and prioritise potential partners into initial categories

1. Start by mapping out all potential referral partners in your area:

- Get your team together and brainstorm all the people and organisations in your local area who might encounter people needing your services
- Group them by type - healthcare, legal, financial, community, etc.
- Take a guess at how many potential clients they might encounter yearly - based on how many people they come into contact with and how active they are in the community.
- Consider how well their typical clients match your ideal client profile
- Consider how easy (or difficult) it might be to build a relationship with them - such as the red tape potentially involved with a hospital as opposed to the local community group leader.

2. Look at what your competitors are doing:

- Make some discreet enquiries about where your competitors get their referrals
- Consider whether these partners work exclusively with one provider or refer to several
- Think about what you could offer that's different from your competitors
- Look for 'gaps' - partners who might not be fully-served by the existing providers in your area
- Consider whether you could improve on relationships that competitors haven't nurtured well



3. Create your partnership plan:

- Evaluate each potential partner based on criteria that matter to your business
- Group them into your Volume, Regular, and Occasional categories
- Decide how much time and resource to allocate to each group
- Create a roadmap for developing these relationships over the next 6-12 months

Something like the following simple table will help you get started on the above:

Partner contact name	
Partner organisation	
Service they provide	
Approx. number of relevant clients they come into contact with/month	
Match of clients to ideal profile	high/medium/low
Easy to connect	easy/medium/difficult
Potential importance to your business	Volume/Regular/Occasional
Proposed next step	i.e call to arrange coffee meeting
Who in the team will take that action	
When this action will happen	

When thinking about potential partners, cast your net wide at first. The obvious candidates are healthcare professionals, but don't forget less traditional sources. Estate agents often know when elderly clients are downsizing and might need support. Local fitness instructors running seniors' classes notice when members start struggling. Sometimes the most valuable relationships come from unexpected places.

“When it comes to referral partners, it's better to think of it in terms of how generous they will be with leads, not where they sit in a hypothetical ranking. A podiatrist may be considered a low priority, but you might find that they refer 5 people a month. A CRM system to measure the effectiveness of the referrer is invaluable for tracking this, so you can invest accordingly.”

Daniel Archer, CEO, Visiting Angels

Creating your referral partner elevator pitch

First impressions matter when meeting potential referral partners. In just a minute or two, you need to spark their interest in working with you. Without a clear, compelling introduction, even the best care provider can struggle to develop valuable referral relationships.

Your elevator pitch - the quick explanation of who you are and what you do - is not about cramming in every detail of your service. It's about creating just enough interest that the person wants to continue the conversation. Your pitch needs to quickly show how your service could help both them and their clients, in a way that feels natural and not "salesy."

A successful pitch for potential referral partners should quickly touch on:

- The specific challenges or needs that you can help with
- How your service complements what they already do
- What makes your care service different from others
- The benefits for both their clients and for them as referrers
- A natural next step to continue the conversation

The most effective pitches don't feel like rehearsed speeches. They flow naturally, show genuine understanding of the other person's world, and position your service as a helpful resource rather than a sales pitch. They're brief enough for an actual elevator ride - about 30-60 seconds - while creating interest in a longer discussion over coffee or a proper meeting.

Here's how to create a pitch that works for different referral partners:

1. Understand your different referral partner types:

- Do some homework on each profession or organisation type before approaching them
- Identify the specific client problems that most concern each type of partner (a solicitor has different concerns than a GP)
- Learn the language they use in their profession to show you understand their world
- Figure out what would motivate them to refer clients to you (it might not always be obvious!)
- Create slightly different versions for different situations (e.g. a networking event needs a briefer pitch than a scheduled meeting)

2. Structure your pitch for maximum impact:

Use this structure for each pitch:

- **1. Problem statement:** "I often hear from [partner type] that their [clients/patients] struggle with [specific challenge]..."
- **2. Solution bridge:** "At [your company name], we help by providing care services that [key benefit]..."
- **3. Unique difference:** "What makes our approach different is [your key differentiator]..."
- **4. Credibility marker:** "We've been supporting people in [your area] [for X years/with specialised expertise in...]..."

- **5. Partnership value:** “For your [clients/patients], this means [client benefit]. For you, it means [partner benefit]...”
- **6. Conversation opener:** “What types of care challenges do you find your [clients/patients] struggling with most?”

Customise this basic template for each type of partner you plan to approach, keeping it under 60 seconds. Practice until it feels natural, not like you’re reciting a script. A good elevator pitch should feel like the beginning of a conversation, not a mini-presentation.

3. Practice until it feels natural:

- Try your pitch out on colleagues and ask for honest feedback

- Test different versions with friendly existing partners to see what resonates
- Record yourself delivering it and listen back (uncomfortable but revealing!)
- Pay attention to responses and adjust based on what works
- Keep refining until it feels conversational rather than rehearsed

Remember that your elevator pitch is just the beginning of a relationship, not the whole sales process. Its job is simply to generate enough interest that the person wants to learn more. Focus on creating that initial spark of “this sounds interesting” rather than trying to cover every aspect of your service.



Template emails to get the ball rolling

Making that first contact with potential referral partners can feel daunting. A generic “Dear Sir/Madam” email rarely gets results, but crafting individual messages from scratch for dozens of potential partners isn’t realistic either. The key is finding the spot between personalisation and efficiency.

Cold contacts rarely work in building care partnerships – people are too busy and receive too many generic requests. Instead, your initial approach needs to show you’ve done your homework and understand their specific context. It should offer clear value to both them and their clients, without asking for too much too soon.

When first reaching out to potential referral partners over email, you’ll get better responses if you include:

- **A personal touch** that shows you’ve researched them specifically
- **A clear explanation** of how your service helps people like their clients
- **Something that builds trust** from the very first contact
- **A simple, low-pressure next step** they can easily say yes to
- **Professional communication** that reflects the quality of your care service

Your goal with initial contact isn’t to secure immediate referrals – that’s too much, too soon. Instead, focus on starting a conversation that can develop into a partnership over time. Show understanding of their world, demonstrate how you might help with challenges they face, and suggest a small next step to explore working together.

Here’s how to develop an approach that consistently opens doors:

1. Do your homework before making contact:

- Take time to understand what services they provide and who their clients typically are
- Find out who the right person to contact actually is (name and role)
- Look them up on LinkedIn or their company website to learn about their background
- Try to understand what professional challenges or priorities they might have
- See if you have any mutual connections who might introduce you (much better than cold contact!)

2. Create personalised messages that stand out:

Here are some starter frameworks for emails for different referral partner types:

New message

For healthcare professionals

To:

Subject: Supporting better outcomes for your patients after discharge

Acknowledge their challenges: *"I know hospital discharge teams are under enormous pressure to ensure patients have appropriate support..."*

Show specific relevance: *"Our team specialises in supporting people with [condition/need] to regain independence at home..."*

Include credibility element: *"We work closely with district nurses to ensure continuity of care, and provide detailed outcome reporting..."*

Suggest simple next step: *"I'd welcome a brief 15-minute chat to understand your current discharge challenges and see if our service might help..."*

New message

For legal professionals

To:

Subject: Helping your clients navigate care needs during property decisions

Acknowledge their focus: *"When clients are selling property to fund care, I understand they need reassurance about the quality and sustainability of care arrangements..."*

Show specific relevance: *"We provide clear documentation and transparent pricing that helps simplify the financial aspects of care planning..."*

Include credibility element: *"We've supported several clients through property transitions while setting up sustainable care packages..."*

Suggest simple next step: *"Could I drop by your office for a quick coffee to learn more about how you currently support clients with care needs?"*

New message

For financial advisors

To:

Subject: Helping your clients make care funding go further

Acknowledge their priorities: *"When advising clients on funding long-term care, I imagine finding quality providers who offer value for money is a key concern..."*

Show specific relevance: *"Our transparent pricing and flexible care packages help clients maximise their care funding while maintaining quality of life..."*

Include credibility element: *"We work with several clients who are managing care through investments, insurance policies, and property assets..."*

Suggest simple next step: *"I'd be happy to prepare a short presentation for your next team meeting on current trends in care funding and provision..."*

3. Plan your follow-up thoughtfully:

- Develop a sequence of gentle follow-up emails if you don't hear back
- Space your follow-ups appropriately (not too soon, not too late)
- Consider alternative contact methods if email doesn't work (phone, LinkedIn, etc.)
- Prepare different follow-up messages that add value rather than just repeating your request

Remember that building relationships takes persistence, but there's a fine line between being persistent and becoming annoying. Create a plan for maintaining contact without becoming a nuisance, and be ready to adjust your approach based on how (or whether) they respond.



Long term success with private clients

Getting private clients is just the beginning – keeping them happy and building a business that can grow without falling apart takes a bit more planning. Think of it as making sure your foundations are strong before adding more rooms to your house!

This chapter is all about setting up your business so it can handle growth smoothly across many years to come, rather than becoming a stressful juggling act that leaves you working harder instead of smarter.

Planning for a business that lasts

To build a care business that thrives year after year with private clients, you'll need:

- **A clear picture of where you're headed** that matches what local clients want
- **Goals you can measure** so you know if you're on track
- **A good handle on your money** so you know what you can afford to do next
- **Ways to keep improving your service** based on what clients tell you
- **A team that understands** how important quality is for private clients

Getting these basics right means you'll not only attract private clients but keep them with you for the long haul. The most successful care businesses think about all these things together, creating a virtuous circle where happy clients lead to a healthier business, which lets you deliver even better care.

Creating a roadmap for your business

Let's start with mapping out where you want your business to go, and making sure your day-to-day work is taking you there.

1. Paint a picture of your ideal future

Your roadmap starts with being clear about exactly what kind of business you want to build. This helps everyone on your team understand where you're headed.

Be specific about what you want to achieve in the coming years. For example: "By 2027, we want to be known as the go-to care provider in [your town] for people with dementia, with most clients rating us as 'excellent' and most of our care team staying with us for over two years."

Look at what you're already good at, and think about how you can build on those strengths as you grow.

Choose 3-5 values that guide how you work

Values aren't just nice words for your website – they should help everyone make daily decisions.

If “reliability” is important to you, spell out what that means in practice: “We always arrive within 5 minutes of the scheduled time, and we let clients know in advance if anything has to change.”

Your technology can help you live up to these values – for instance, Birdie makes it simple to monitor if visits are happening on time, helping you spot and fix any problems quickly.

Get clear about who you serve best

Think about:

- What kinds of clients do you want to focus on? (Age groups, conditions, neighbourhoods)
- What services are you best at providing?
- What prices make sense for your area?
- What makes you different from other care providers nearby?

Much of this thinking should connect with the market research you did using the steps earlier in this guide.

Set clear goals for the next few years

Turn your vision into specific goals that cover different parts of your business:

Make these goals ambitious but possible, and write them down somewhere your whole team can see them.

- Money (e.g. Grow our income by 20% each year while keeping at least 8% as profit)
- Clients (e.g. Have 95% of clients say they're happy with our service)
- Operations (e.g. Increase our weekly care hours from 200 to 800)
- Team (e.g. Reduce the number of carers who leave each year from 35% to 15%)
- Quality (e.g. Maintain an 'Outstanding' CQC rating)

2. Make sure your daily work supports your vision

Once you know where you're headed, check if how you're currently working will get you there, or if you need to make some changes.

Take a close look at how you do things now

Review your key processes (marketing, onboarding, care delivery, auditing etc.) to see if they fit with your goals for private clients.

For each process, ask yourself:

- How you bring on new clients
- How you plan and deliver care
- How you schedule your team
- How you check quality
- How you handle billing and payments
- How you collect and use feedback

- Does this work well with our vision?
- Would private clients be happy with this?
- Will this still work well if we have twice as many clients?
- Is this making things harder than they need to be for our team or clients?

Spot what might hold you back as you grow

What works fine with 10-20 clients often falls apart with 30-50. Ask yourself questions like 'If we doubled in size, would this still work?' and 'Does this depend too much on just one or two key people?'. Potential blockers could be:

- Struggling to find and keep enough good staff
- Taking too long to train new team members
- Managers having too many people to supervise effectively
- Outdated systems that don't talk to each other
- Quality checks that miss problems

For each potential problem, think about practical solutions. For instance, if your managers are stretched thin, consider using care technology like Birdie that helps them quickly see what needs attention, rather than having to check everything.

Plan how you'll grow your setup

Good care management systems can save you tons of time by automating routine tasks, making communication easier, and giving you the information you need to make good decisions.

- What technology will help you work smarter?
- How will your management team need to change?
- What support functions (like training or compliance) will you need more of?
- Will you need different office space?

Systems like Birdie bring together care management, scheduling, medication management, and financial information in one place – which means less double-entry and a clearer picture of how your business is doing.

Set up ways to keep getting better

Create simple systems that help you continuously improve.

- Pick a few key numbers to track for each part of your business
- Have regular team meetings to review how things are going
- Create an easy way for staff to suggest improvements
- Regularly ask clients what they think
- Keep an eye on what other care providers are doing well

For care quality, it's important to track things like how quickly you respond to alerts, any incidents that happen, and whether visits start on time. Tools like Birdie's Q-Score analyse your data to show how you'd do in a CQC inspection, helping you fix issues before they become problems.

Schedule regular check-ins on your bigger picture

Set up a rhythm for reviewing your progress. Make these meetings a priority, and use them to discuss insights, track progress, and identify ways to improve.

- Monthly team meetings to look at day-to-day performance
- Quarterly sessions to check progress toward your bigger goals
- Annual reviews to take a fresh look at your overall direction

Look at both "early warning signs" (metrics that predict future problems) and results of what you've already done to get a complete picture of your business health.

Build a technology system that helps you work smarter, not harder

1. Put the joy back into caring for you and the team

Money is tight, expectations are high, and every minute matters in today's homecare world. For times when it's impossible to work any harder, Birdie's technology helps you work smarter: it connects everything and everyone, shows you what needs attention, and helps you focus on changes that improve both care quality and your bottom line.

Care more, worry less with smart technology that's always by your side!

- **Get everything (and everyone) working together**
A system that's built as one, so it works as one. Bring your care management, rostering, finance and more together into one system so you can save time, reduce mistakes, and keep everyone on the same page.
- **See everything, miss nothing**
See your entire care operation at a

glance so you can spot issues early, respond quickly, and prove your quality to regulators with real evidence

- **Never feel alone again.**
Get the technical and strategic support that you and your team need to thrive, and have a real voice in the future of your care technology.

2. Make person-centered care easy to deliver consistently

Running your care business shouldn't mean drowning in admin. Birdie's care management tools help you deliver high-quality care while cutting down on admin time, all with powerful analytics that give you complete oversight.

- **Get the full picture of each client**
See everything about your clients in one place. Birdie's digital care plans keep every detail organised and up to date, from medication schedules to personal preferences. Structured assessments and digital body maps help you make client needs crystal-clear.

- **Cut down on medication errors**
Track medications clearly with eMAR charts. Carers get precise instructions on what to give and when, with PRN protocols providing all the information needed to administer as-needed medication with confidence. Pre-built reports shows what percentage of medications are being recorded properly, while logs provide detailed records of outcomes, timing and administration methods.
- **Eliminate assessment headaches**
Stop spending a lifetime on assessments. Birdie's structured assessments are best-in-class, up-to-date, and fully compliant with regulatory requirements. Better yet, they're dynamic – recommending further assessments based on what you've already recorded. Your team can focus on the client, not on paperwork, completing only what's relevant instead of wading through pages of generic questions.

3. Always be compliant and inspection ready

Maintaining high standards and proving your quality to regulators shouldn't keep you up at night. Birdie's quality and compliance tools help busy care agencies like yours gather evidence, track issues, and prepare for inspections with confidence.

- **Be inspection-ready at all times**
Gather and organise evidence throughout the year. Birdie's tags for evidence gathering help you categorise evidence for quick retrieval during inspections or tender applications. The Client Feed and Notes feature makes auditing simple by providing a central place for all client information and evidence, with clear audit trails of changes.

- **Coordinate concerns effectively**
Stay on top of issues as they arise. Birdie's Inbox and real-time alerts help you track and coordinate all concerns raised within your service. You can then review reports that show all incidents, showing when they were raised along with how quickly they were qualified and what percentage are resolved within 24 hours.
- **Build quality into every process**
Enhance compliance with a system everything's connected. Care plan updates trigger assessment reviews, while medication alerts feed into performance monitoring. Staff training records connect with scheduling to ensure compliant service delivery, and audit trails link evidence across all departments. This comprehensive integration means you're always inspection-ready, with quality built into each workflow rather than treated as a separate function – saving time while improving outcomes.
- **Drive continuous improvement**
Identify areas for enhancement before they become problems. Pre-built reports such as the Q-Score in Birdie Analytics provide metrics on your office team's performance, from how up-to-date care plans are to medication monitoring and alert responsiveness. Reports even shows how many tasks have been added per client, how many notes per task, and how often plans are updated.

Our comprehensive support and partnership approach helps busy care agencies like yours get the most from Birdie while feeling confident and supported every step of the way.

www.birdie.care/book-a-demo for a no strings attached demo, and to get all your questions answered.





Interview with Amrit Dhaliwal, CEO of Walfinch

Walfinch provides bespoke, high-quality care at home to individuals and families across the UK - including hourly at-home care and 24-hour live-in care, companionship and specialist care for conditions such as dementia, multiple sclerosis (MS), stroke rehabilitation and more. Walfinch are focused on the private client market.

1. What informed your initial decision to build a care business around a private client base, and how do you see that decision paying off over the next 5-10 years?

In 2013 I was rejected from a local authority contract. I had just started trading, so I was left with no choice other than to build a private business. It was a pivotal moment that forced me to rethink my entire business model. Looking back, this rejection was actually a blessing in disguise because it pushed us toward a more sustainable path.

I think over the next 5-10 years it will be more important than ever to run a high-margin business. The care sector faces constant financial pressures, and those businesses operating on thin margins from local authority contracts will face serious financial problems.

Private care allows us to maintain quality while ensuring business viability, creating a model that can weather economic fluctuations better than companies more dependent on public funding.

2. What are some of the things you are investing in today that may help Walfinch stand out from competitors in the private care market years from now?

We are focused on being a 'different' care brand. We're constantly asking ourselves

"What things have never been done in care?", then do those things. Innovation is at the heart of our strategy - not just technological innovation, but rethinking the entire care experience from the ground up.

We're investing in unique training approaches for our care teams, and creating contemporary client experiences that don't exist elsewhere in the market. Essentially, as providers we can constantly move the dial of the market rather than just keep pace with it.

3. Has serving private clients shaped Walfinch's approach to hiring and building a successful care team?

Yes, because we are much more service focused. We need to run the care business like a 5* hotel, everything from how we answer the phone to how we deliver the care. This mentality influences our entire recruitment process - we look for people with exceptional interpersonal skills.

Our training programmes emphasise both technical care skills and the softer aspects of creating an elevated care experience. We've implemented rigorous selection criteria that go beyond basic qualifications, seeking out individuals who genuinely connect with our vision of premium, personalised care. Our retention strategies also reflect this service-first mindset, as we invest heavily in

supporting and developing our team members to ensure they feel valued so they can deliver consistently exceptional care.

4. If regulations or funding in the care sector change significantly, how would you recommend an organisation protect and grow their private clients?

Be active. Be quick off the mark. Clients want the service right now, so don't wait 48 hours to pick up the phone. Responsiveness is absolutely critical in this business - the companies that thrive will be those that can move fast, and adapt rapidly to changing conditions.

Secondly, have clear values that you can demonstrate in everything you do - from your marketing materials to how your carers interact with clients in their homes. Consistency builds trust, and trust is everything in private care. Know who you are talking to in your message and speak to that person alone; everything needs to feel personal and directly relevant to your target client's specific needs and concerns.

When regulations shift or the industry changes once more, the businesses that will protect their client base are those that have built genuine relationships rather than transactional interactions.

The essential reading list for private client businesses

We've put together a reading list for private client acquisition, based on suggestions from our community. While you're busy running your care business, finding time to read and learn might seem tricky - but even just trying one of these books could end up being fundamental to ensuring your business' growth. Worst case scenario is that you end up with an impressive bookshelf in the office!

Books for strategic business development

- **'Good to Great' by Jim Collins** - Understanding the disciplines that transform good companies into exceptional performers.
- **'The E-Myth Revisited' by Michael Gerber** - Creating systems that allow your business to grow independently without the constant presence of the founder.

- **'Scaling Up' by Verne Harnish** - Practical approaches to managing growth challenges, from cash flow to team development.

Books for marketing and client acquisition

- **'Building a StoryBrand' by Donald Miller** - Clarifying your message to effectively connect with private clients and their needs.
- **'They Ask, You Answer' by Marcus Sheridan** - Content marketing approaches for service businesses, including a focus on how to address client's concerns transparently.
- **'The Referral Engine' by John Jantsch** - Creating systematic referral processes, which is an invaluable channel for care businesses.

Books for service excellence and client experience

- **'Uncommon Service' by Frances Frei & Anne Morriss** - How to prioritise excellence in the areas that matter most, arguing that you can't be excellent at everything and must make strategic trade-offs.
- **'The Inside-Out Effect' by Behnam Tabrizi** - Addresses the leadership challenges of transforming organisations to deliver outstanding service.
- **'The Effortless Experience' by Matthew Dixon** - Focuses on reducing friction in client interactions, a particularly relevant consideration for care services that often involve complex administration.

Books for care-specific business development

- **'The Future of Aging' by Joseph Coughlin** - Understanding the changing expectations of older adults and how to implement that into your services.
- **'Person-Centred Care for Complex Care Needs' by Judith Hibberd** - Applying person-centred approaches in high-need contexts and at scale.
- **'Digital Health' by Homero Rivas** - How technology is transforming care services, offering insights into potential innovations for your business.

Books for financial management and sustainability

- **'Profit First' by Mike Michalowicz** - Ensuring profitability in service businesses.
- **'Simple Numbers, Straight Talk, Big Profits!' by Greg Crabtree**

- Straightforward financial management approaches for small and growing businesses.

Getting the most from your research

Here's a quick way to make sure any really useful knowledge you get from reading these books is taken in by yourself and those around you.

1. Create a structured learning approach

- Develop an easy-to-achieve quarterly reading schedule - for example, one of these books every 3 months.
- Form a leadership book club within your organisation
- Allocate specific time each month for reading and reflection

2. Implement systematic application

- For each book, identify 3-5 key actionable ideas it shares
- Create implementation plans for the most relevant concepts for your own business
- Test new approaches through small pilot initiatives
- Measure the impact of applied concepts through setting goals and measuring metrics
- Adapt the new approaches based on results

3. Develop organisational learning habits:

- Build a company library of core resources
- Encourage continuing professional development by sharing these resources with others

Your journey to private client success

We've covered a lot of ground in this handbook, from understanding what private clients expect to building referral networks, to crafting your unique value proposition to planning for long-term business growth.

Key takeaways

- **Private clients represent a path to sustainability** in a sector facing unprecedented financial pressures. With typically higher margins and greater control over your rates, private work offers the stability that local authority contracts often can't provide.
- **Understanding expectations is crucial.** Private clients see themselves as customers rather than service recipients, and their expectations for reliability, responsiveness, and personalisation are accordingly higher.
- **Your marketing should use a variety of channels**, reaching potential clients through social media, community presence, direct outreach, and referrals.
- **Referral partners can become your most valuable source of clients.** However it's key to take the time to build genuine relationships with referral partners in order for this to take flight!



The road ahead

Building a sustainable private client base requires persistence, adaptability, and a commitment to continuous improvement. There will be challenges along the way, but the path we've outlined in this guide hopes to provide a roadmap to a more sustainable future.

Remember that you're not alone on this journey. The homecare community is full of providers facing similar challenges, and there's tremendous value in sharing experiences and learning from each other - as we've seen from the conversations that have come out of The Executive Wing and Flock members!

Most importantly, don't lose sight of why you entered care in the first place. The strategies in this handbook aren't just about business growth - they're about creating the financial stability that allows you to deliver care to people who need it. Each private client you gain represents not just revenue, but an opportunity to make a meaningful difference in someone's life.

We wish you every success as you build your private client base and create a sustainable future for your business. The sector needs passionate, dedicated providers like you who are committed to excellence in care - and with the right approach, you can ensure your services will be available to your community for years to come!

Best of luck,

Danielle Roberts,
Implementation & Enablement at Birdie



Join the discussion

Now that you've finished this book, here is an opportunity to get real time support from a community as you grow and expand into the private client market.



Become part of Flock

Join 2,000+ peers in Flock, the fastest-growing community for social care professionals. Share challenges, celebrate successes, and learn from others facing similar situations. This vibrant network helps you stay ahead of industry trends while finding practical solutions to everyday problems.

Join Flock for free here:
www.flock.care



Become part of the Executive Wing

This is the UK's only network for senior leaders in large-scale homecare providers. This exclusive group meets to discuss the latest topics and challenges in the home care industry, in events both online and offline. If you have more than 140 care recipients, then consider joining the Executive Wing and attending their next event.

Apply to the Executive Wing here:





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