



# Master Marketing Plans That Attract New Clients

Bob Roth  
Managing Partner  
Cypress HomeCare Solutions

## My Inspiration is Our Commitment



Joan Roth

## Cypress HomeCare Solutions

- Founded 1994
- Serving Maricopa County – Phoenix
- 215 - 250 Clients
- 250 - 320 Caregivers
- 11 Staff
- Service Lines
  - Self Pay
  - State Programs (Medicaid)
  - Private Insurance (long term care insurance)

## About Cypress HomeCare

- Ranked #1 Home Health Agency in Arizona for 2010 and 2012
- **Grew out of Roth Family's experience caring for their mother – this fueled the passion to care for people in their community the same way they cared for their own mother**
- Established as a dynamic, progressive organization; strives to deliver client-centered care
- **Dedicated to providing the highest quality, cost-effective home care solutions, so clients enjoy their independence, enhance quality of life and peace of mind**
- Trained caregivers – experiences, compassionate and willing to support client needs
- **Quality assurance standards – staff genuinely interested in satisfying each clients' individual needs**



**1** **CYPRESS HOMECARE SOLUTIONS**  
 1112 S. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
 Year Est. 1994 Patients 700  
 Local Administration: Five medical providing high quality care within home care environment in domestic and independent care

**2** **BANNER HOME CARE**  
 2515 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
 Year Est. 1994 Patients 700  
 Local Administration: Five medical providing high quality care within home care environment in domestic and independent care

**3** **NIGHTINGALE HOMECARE**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
 Year Est. 1994 Patients 700  
 Local Administration: Five medical providing high quality care within home care environment in domestic and independent care

**4** **HOME INSTEAD SENIOR CARE**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**5** **ALARYS HOME HEALTH INC.**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**6** **CAREFREE HOMECARE COMPANION SERVICE INC.**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
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**7** **TOUCHING HEARTS AT HOME**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**8** **TEAM SELECT HOME CARE**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
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**9** **ASSISTING HANDS HOME CARE**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**10** **I NEED AN ANGEL INC.**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
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**5** **COMFORT KEEPERS**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**6** **ALARYS HOME HEALTH INC. (FORMERLY CONCRETE HOME HEALTH)**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**7** **AT HOME SOLUTIONS**  
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 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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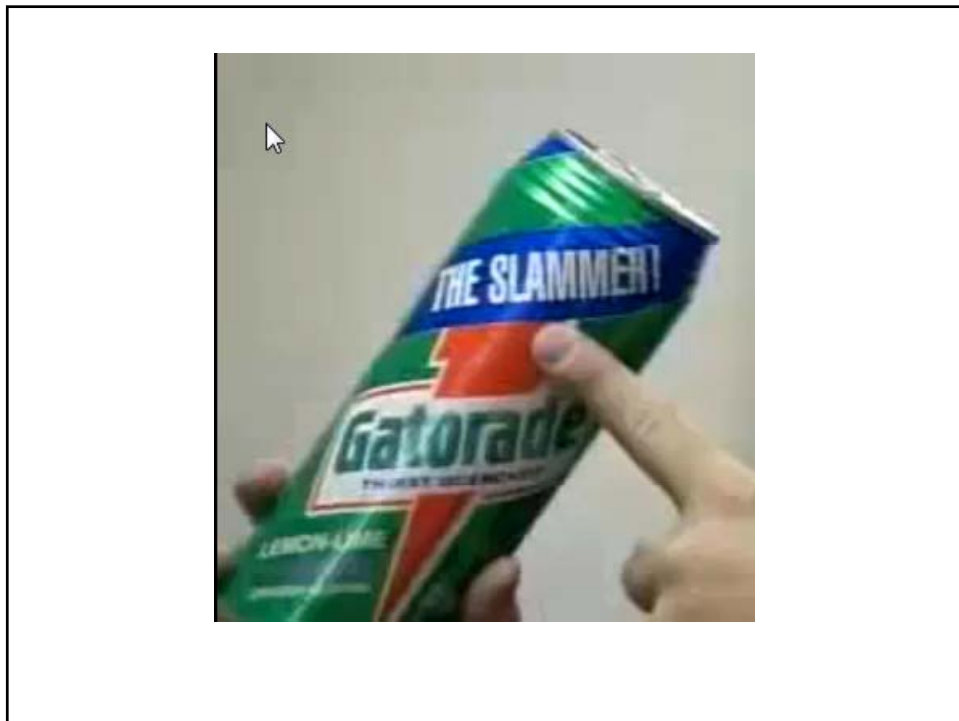
**8** **AT HOME PERSONAL CARE LLC**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**9** **BRIGHTSTAR HEALTHCARE - TEMPE**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
 Medical/Non-Medical: 700-820-8200  
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**10** **SAFERNET HOME HEALTH, A WATERMARK AGENCY**  
 1011 W. GARDNER ST., #111, PHOENIX, AZ 85012  
 602-226-4525  
 Local Administration: 700-820-8200  
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100 - Ranking Agency: The Best of Arizona Business 2012 To visit go to [www.azbizmag.com](http://www.azbizmag.com)

114 - Ranking Agency: The Best of Arizona Business 2012 To visit go to [www.azbizmag.com](http://www.azbizmag.com)



***So what does a Consumer Product Goods  
(CPG) Marketing Plan look like?***

## **10 Step Marketing plan**



By Mariel Angelou A. Parulan | 19 January 2011

### **Part I: 's POSITIONING**

1. Primary target market
2. Needs, Wants, Expectations
3. Competitors
4. Opportunity Gap
5. Market Sizes (3 Cs)

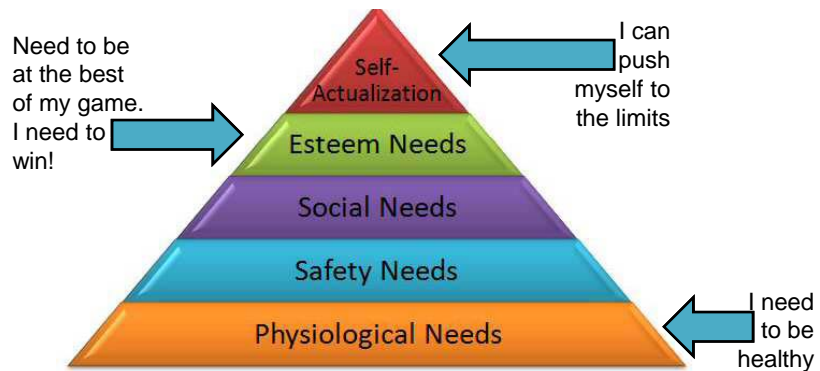
# 1. Primary Target Market

*Secondary target market: Young athletes*

- **The Actives**
  - ✓ 15-50 years old
  - ✓ Male & Female
  - ✓ Single & Married
  - ✓ Class AB to C
- **Behavior**
  - ✓ Hydrates after every workout
  - ✓ Wants to be at the best shape
  - ✓ Competitive: pushes self to the limit
- **Lifestyle**
  - ✓ Active & always on-the-go
  - ✓ Engages in health-oriented activities:
    - Gym, sports, running, climbing



# 2. Needs, Wants, Expectations



- I **NEED** to be fit for my activities.
- I **WANT** a drink that has everything that my body needs, from warm-up to cool down
- I **EXPECT** it to step up my work out and put me at the top.

### 3. Competitors

- **Direct:** Powerade, Lucozade
- **Indirect:** mineral water, tap water, C2, Fit n right
- **Variables:** Taste options (flavors), price, availability, health advantages

	Gatorade	Powerade	Pocari Sweat	100 plus
Hydrates				
Replenishes electrolytes				
Enhance muscle action				
Fights fatigue				
Boosts brain fuel				

*Unique positioning:* All-in-one sports drink that promises to provide you a **hero's winning formula**

### 4. Opportunity Gap

- Gatorade is the world's no. 1, scientifically-tested sports drink. Studies show that Gatorade hydrates 90% better than water and 45% better than any other sports beverage.
- Gatorade not only hydrates but also enhances muscle action, fights fatigue and boosts brain fuel.
- It is the **hero's winning formula!** Science has proven it and athletes recommend it.
  - *Go ahead and step up your work out. Then do a heroes do.*



## 5. Market Size

- The sports drink category is ~ \$7.6 billion industry and takes up 21.3% of total beverage consumers
- With \$ 654 million sales, the primary competitor (Powerade) takes 8.6% of the total market share
- **With \$ 2.6 billion sales, GATORADE takes 34.2% of the total market share**

## Part II: 's STRATEGY

6. Product
7. Price
8. Promotion
9. Place
10. Generic winning strategy



## 6. Product

- Famous for its flavors – Blue Bolt, Grape, Tropical Fruit, Orange Chill, Pink Lemonade, Lemon Lime
- Available – 400 ml, 500 ml, 1.5 ml

### **Its not just a drink, it's the complete package!**

- It enhances muscle action... Ensuring adequate oxygen and blood to perform at their peak
- Fights fatigue... with adequate carbohydrates, delaying fatigue and maximizing energy
- Boosts brain fuel...by preventing low blood sugar to stay mentally at the top of your game
- Contains sodium to prevent water loss, potassium to improve muscle performance

## 7. Price

**GATORADE** is 20% premium priced

- ✓ Value of the brand (status)
- ✓ Value of the product itself

	Gatorade	Powerade	100 plus	Pocari Sweat
price	30.30/ 500 ml	29.25/500ml	21.75/500 ml	21.75/330
Price/ml	P 0.061	0.0585	0.044	0.066



## 8. Promotion

- Media advertising
- Print advertising
- Events and Experiences
- Online
- Tie-ups



**Spying on the competition** – advertising, online marketing, events/experiences

- **100 plus** = “Outdo yourself”
- **Pocari sweat** = “Refreshing replacement”
- **Powerade** = “Keep playing”

## 9. Place

- In all leading groceries, supermarkets and convenient stores nationwide
- Supermarkets (SM hypermarket, Shopwise, Rustan’s)
- Mercury drug stores, Mini-stops, 7 Eleven, etc.

## 10. Generic winning strategy

- Well-differentiated target population
- Getting the best image models
- Use of science to emphasize the company's expertise on the product

"For a better workout, exercise proper hydration with the world's no. 1 sports drink. [Gatorade](#)."

## 10 Step Marketing plan



## Now What?

Okay Bob, I get it! You worked 2 large CPG Companies, their Marketing budgets and plans are rather extensive.

How does my little home care agency put a Marketing Plan together when we don't have the resources that these big company's have?

*First let's start with a question....*

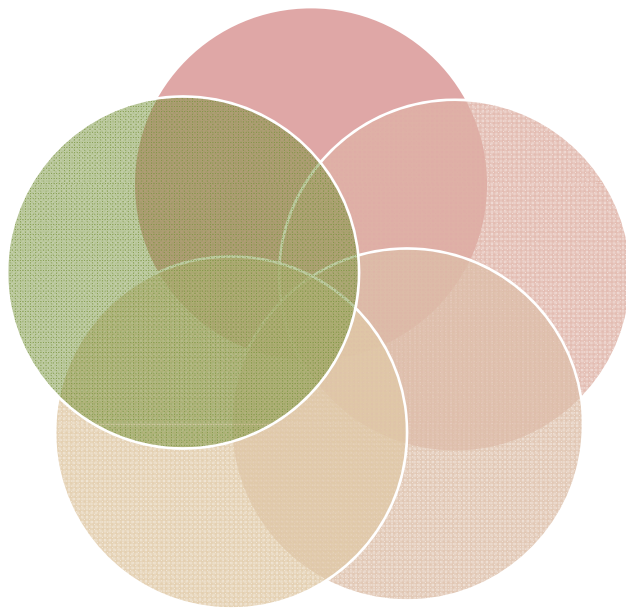


## Who Are You?

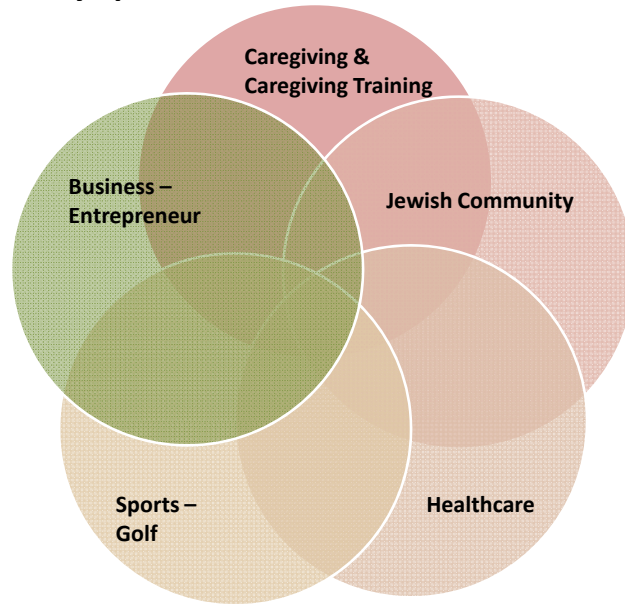
We know you are a non-medical, private duty home care company, but really *who are you?*

### What Are Your Spheres?

- What are you focused on?
- What best describes you?
- Your spheres define you.

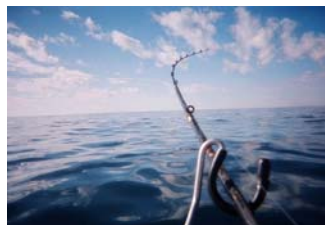


**These are my spheres:**



**You Need to Decide...**

Would you like to be fishing in an *ocean*?



Or would you rather be fishing in a *barrel*?



## **Ways to fish in the Home Care *Ocean***

- Yellow Page Ads
- Senior Magazine Ads
- Newsletters – Use only if targeted to your Key Influencers.
- Multiple offices - No one cares where your offices are located.
- Bolting on additional services – geriatric care services, plastic surgery, baby sitting, Dog poop removal.
- Television and Radio – Without connected to an overall plan

## **Ways to fish out of a *Barrel***

When it comes to **MARKETING** home care  
2 keys to remember:

- Who are you **MARKETING** to?
  - When is the greatest propensity of need?
- What is your Message?
  - And how does the person hearing the message relate to it?

## It all begins with 3<sup>rd</sup> Party Influencers

*What is a 3<sup>rd</sup> Party Influencer?*

- Home Care is one of the few industries that you really are not **MARKETING** your services to the ultimate end user (in our case The Care Recipient)
- You are **MARKETING** to what we define as the 3<sup>rd</sup> Party Influencer.
- 3<sup>rd</sup> Party Influencers are in many cases the ultimate/final decision maker(s) relative to home care.
  - So who are your 3<sup>rd</sup> Party Influencers?

## 3<sup>rd</sup> Party Influencers (just to name a few)

- Adult Children
- Geriatric Care Managers
- Trust Bankers
- Elder Law Attorneys
- Estate Planning Attorneys
- Hospital Discharge Planners
- Medical Professional Community
- Home Health Care
- Hospice
- Medical Equipment Companies



## When is the greatest propensity of need?

Usually around the Holidays is when family members, friends and neighbors notice a change in a person's physical and behavioral well being.

- Easter
- Passover
- Thanksgiving
- Hanukkah
- Christmas
- New Year's

Now we know that a good foundation to an agency's **MARKETING** plan is centered around:

- Reaching 3<sup>rd</sup> Party Influencers
- Greatest Propensity of Need
- What is your message? And how can the receiver of this message relate to it?

When you are **MARKETING** it is imperative to that you create your message so that the person receiving your message can relate to it.

Example of radio ad:



## **What is customer acquisition?**

- Customer acquisition is the process of obtaining new customers

Your “business life cycle” consists of five stages: suspects, prospects, clients, referrals, and retention.

- Everyone starts off as a SUSPECT.
- Smart **MARKETING** will identify your PROSPECTS.
- Though your marketing and opening process you'll convert them into CLIENTS.
- As successfully satisfied CLIENTS they'll send you REFERRALS.
- Through service, results, and fear of disconnect you'll RETAIN.

**The difference between making and losing money rests on understanding the business life cycle.**

- If you don't target a niche then you don't have SUSPECTS.
- If you can't market to them you have no PROSPECTS.
- If you can't convert the prospects then you have no CLIENTS.
- If you can't successfully keep them as CLIENTS then you will generate no REFERRALS.
- And if you can't RETAIN your clients then you'll never have enough money

"A business absolutely devoted to Customer Service Excellence will have only one worry about profits. They will be embarrassingly large."  
**-Sir Henry Ford**

## **Concierge**

- This is the TRUE difference between you and the next agency, the customer service difference.
- It is keeping in mind that you not only want to MEET your client's expectations you want to EXCEED them.

## Check this out

From: Jonathan Roth [mailto:rothj@terlatowines.com]

Sent: Thu 10/6/2011 5:08 PM

To: Flanagan, Denny [ORDFO]

Cc: Customer Relations

Subject: Thank you

Captain Denny,

I wanted to take a moment to thank you for the note that you sent back to me on last night's flight from ORD to SAN.

So far this year, I have flown over 50,000 miles on United and over 50,000 miles on American. And this was the first time ever that someone took the time to thank me for my patronage. As you can imagine, I spend a lot of time on airplanes with my job, and it is nice to be appreciated.

It is folks like you that truly understand, that customers do have a choice in flying, and those little things make it easier to choose United over other carriers.

Thanks Again,

Jonathan Roth

=====

Jonathan Roth

Vice President

National Accounts Off-Premise



602-615-9462

[rothj@terlatowines.com](mailto:rothj@terlatowines.com)

From: Flanagan, Denny [ORDFO] [mailto:Dennis.J.Flanagan@united.com]

Sent: Friday, October 07, 2011 7:17 AM

To: Jonathan Roth

Subject: RE: Thank you

Mr. Roth,

Thank you for your kind words. Statistics shows that for every compliment or complaint that there are 100 others thinking of doing the same thing. Feedback is so important to know you are on the right track. In the service business the recipe for success is quite easy and it has three ingredients; choose your attitude for the altitude you want to maintain during the day, anticipate your customers needs and exceed their expectations. I have a few work philosophies and they have proved effective of the years;

-- I believe that **each customer deserves a good travel experience** whether on United, Continental, American or Delta.....train, bus, taxi or with your best friend in his car. You deserve a safe and comfortable ride.

-- **Treat each customer as if it is their first flight** and have no expectations....I lead by example and this helps motivate the crew to do a better job. When they see me stow bags, assist moms with strollers and answer questions as if it is the first time I heard it they are brought back to their new hire days.

-- **It is easier to keep the customers you have than to find new ones**...United has a devoted sales team to find new customers and it is time consuming and expensive but necessary. My job is somewhat easier and less expensive and that is to provide a safe and customer-oriented service. If I do my job then the folks in the sales department will have less pressure on themselves.

Jonathan, I look forward to seeing you on many more of my flights flying the "Friendly Skies" of United Airlines. If time is available I will buy us a Starbucks and we can chat for a few minutes.

Capt Denny

## Questions?

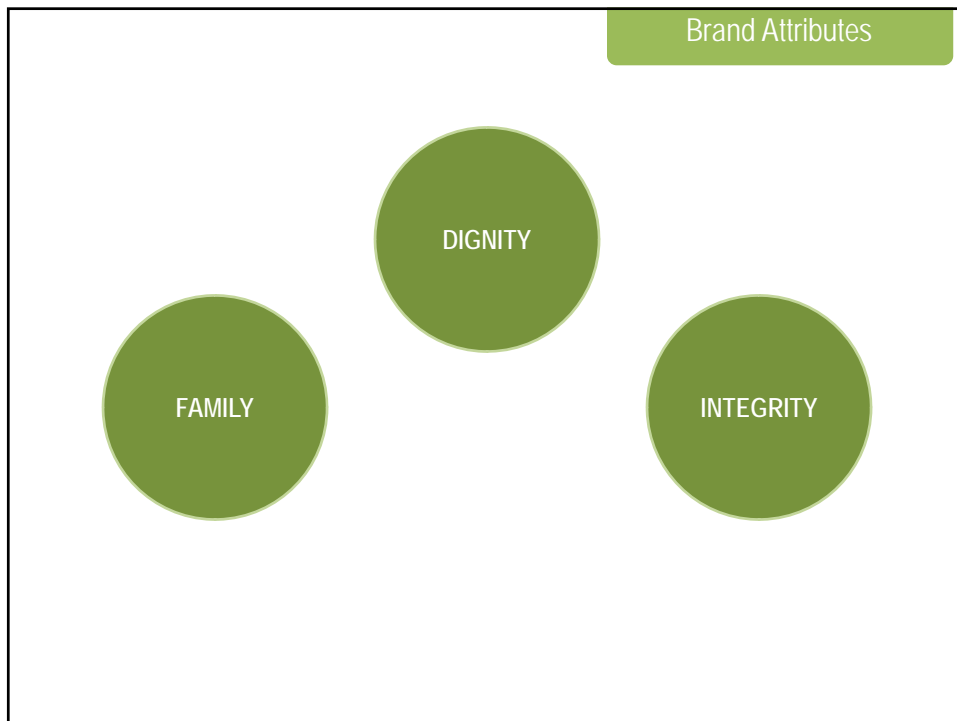
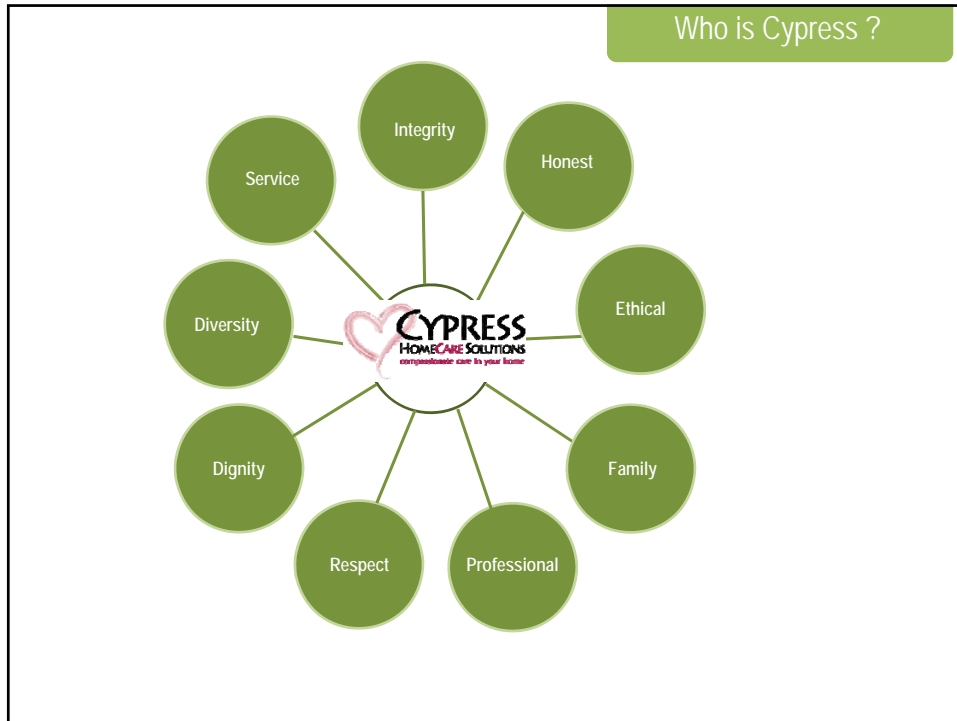
- It is all about Customer Acquisition
- How do you identify your PROSPECTS?
- Where do I spend my marketing dollars?
- When do I spend my marketing dollars?
- How much marketing money should I allocate to the Marketing Plan?
- What does the Greatest Propensity of Need mean?
- Wouldn't you like to fish in a barrel versus fishing in the ocean?
- Why is it important to Market during the Holidays?
  - This is when it is most readily recognized because family members have not seen one another since the last holiday
- When Developing your Marketing Plan you have to look at the entire year

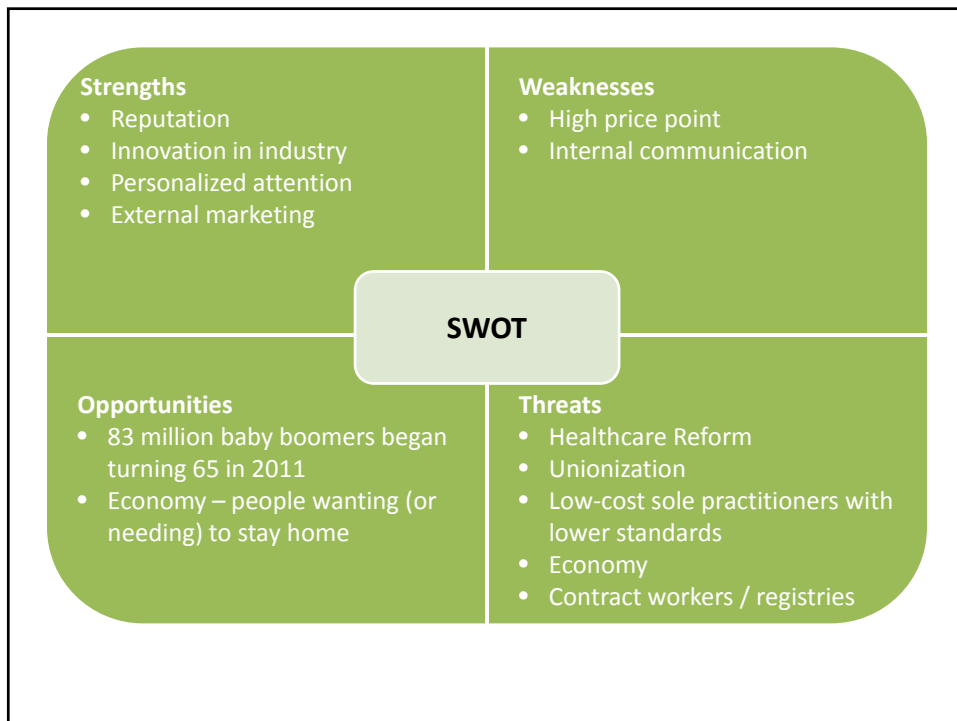
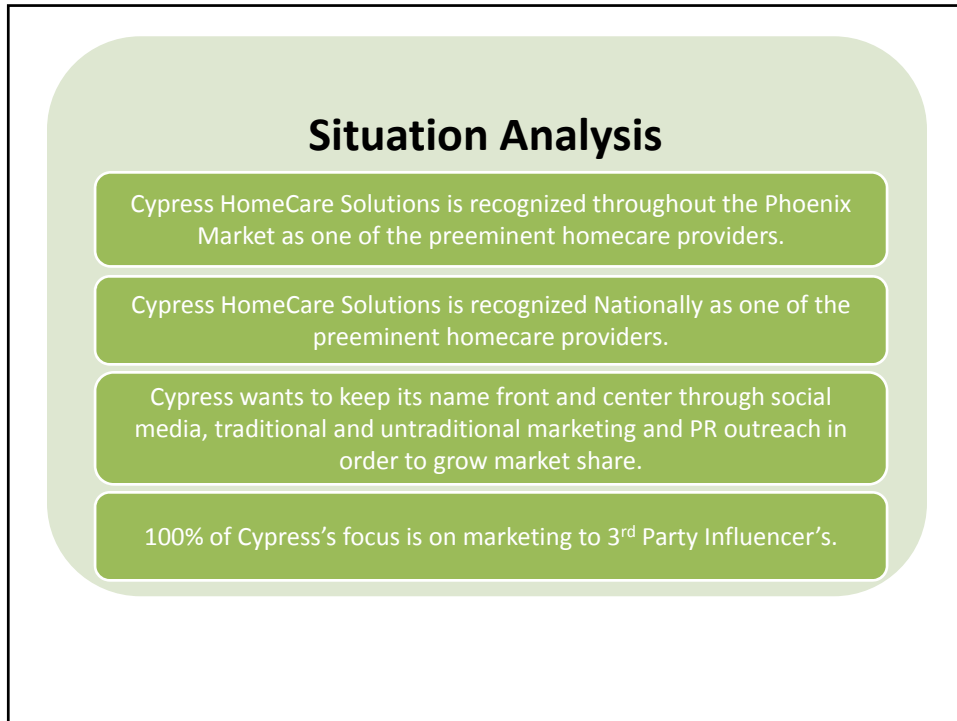
## Building Your Marketing Plan

Let's look at Cypress as our example in putting together a **MARKETING** plan for a Home Care Agency.

- It begins with who is Cypress
- Then we build from there

I will then show you how we build our **MARKETING** plan and why we analyze our spends







## Goal

For Cypress to be the industry leader in  
homecare solutions

## 2013 Objectives

\$5 million in revenue

5,200 – 5,500 hours per week

Positive increase by 12 to 15 caregivers per month

75% Private Pay – 25% Medicaid

## Key Messages

Cypress is a locally owned and operated family business that has been in the Valley for 18 years

Cypress is dedicated to providing “compassionate care” for its clients and assisting adult children as their roles reverse.

Cypress is committed to its employees, focusing on five keys: recruit, train, empower, support, and retain

## Targets



### Consumers

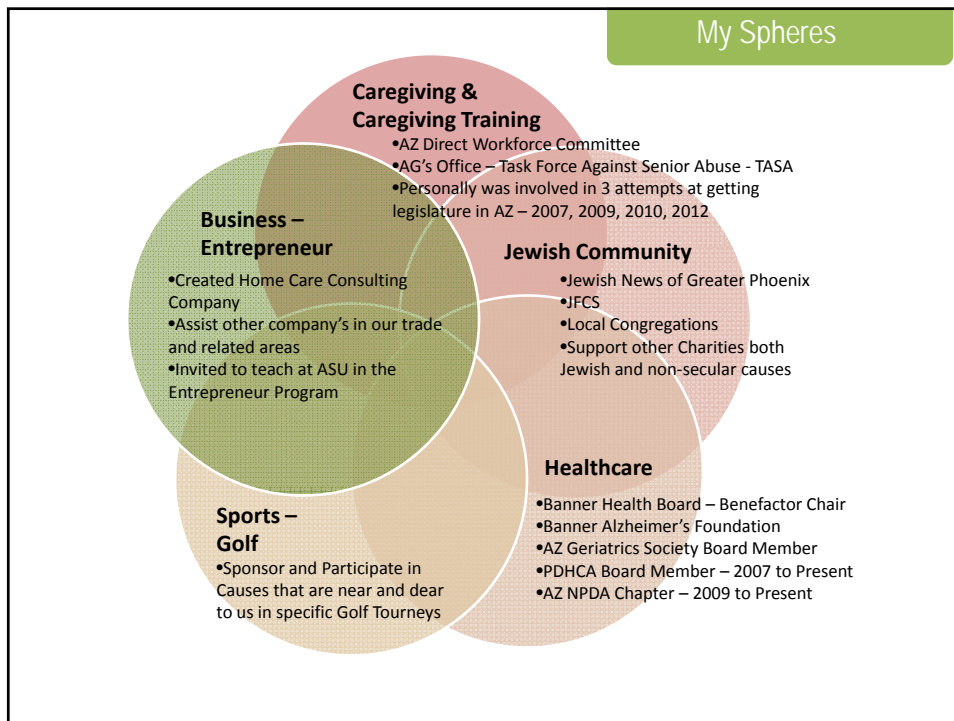
- Children with older parents

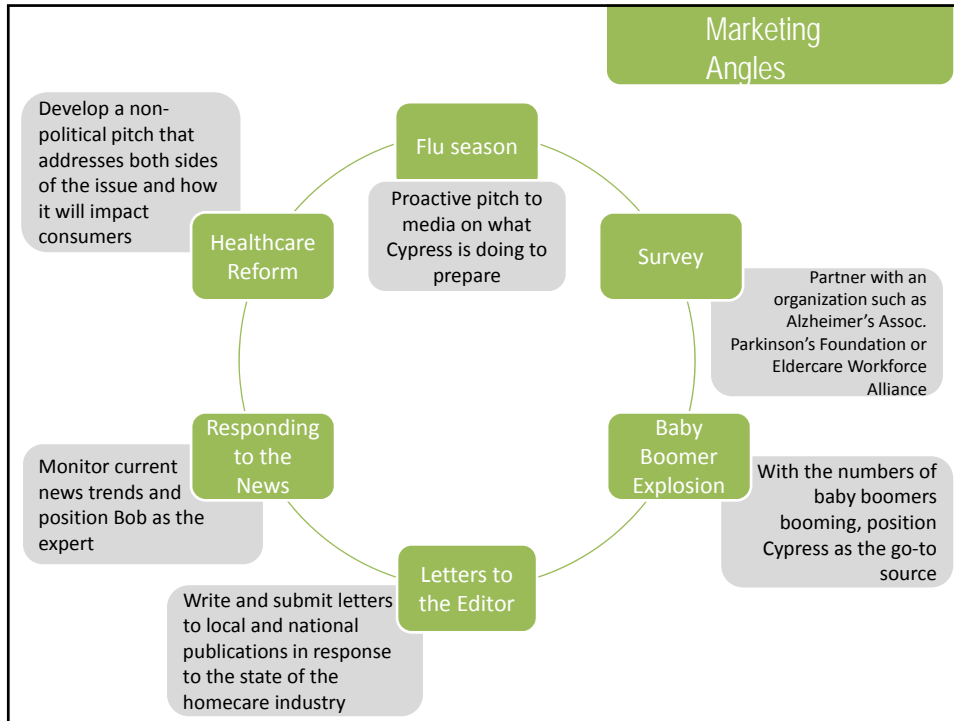


### Referral Sources

#### 3<sup>rd</sup> Party Influencers

- Hospital
- Discharge Planners
- Banner Alzheimer’s Institute
- Geriatric care managers
- Fiduciaries
- Trust Bankers
- Estate Planning Attorneys
- Elder Law Attorneys
- Home Health Care Agencies
- Hospice
- Medical Equipment Companies





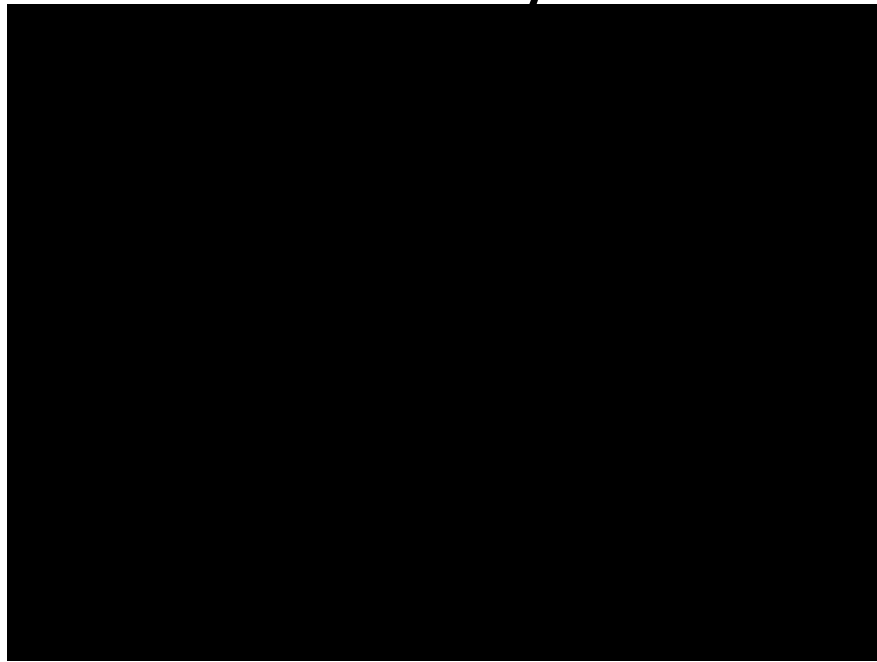
- Key Awareness Months**
- October**
- Alzheimer's Memory Walk
  - Cold and Flu Awareness Month
  - Healthcare Quality Week – 2<sup>nd</sup> week of October.
- November**
- Alzheimer's Disease Month
  - Home Care & Hospice Awareness Month
  - Hand Washing Awareness Week – 1<sup>st</sup> week of November
- March**
- American Red Cross Month
- May**
- American Stroke Awareness Month

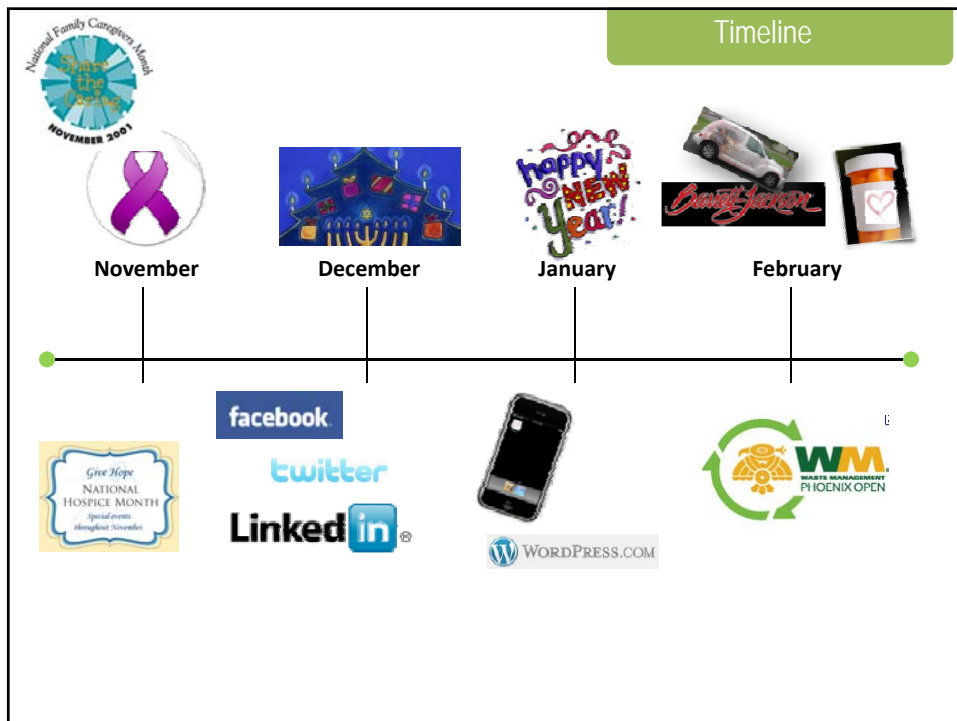
Holiday Ideas

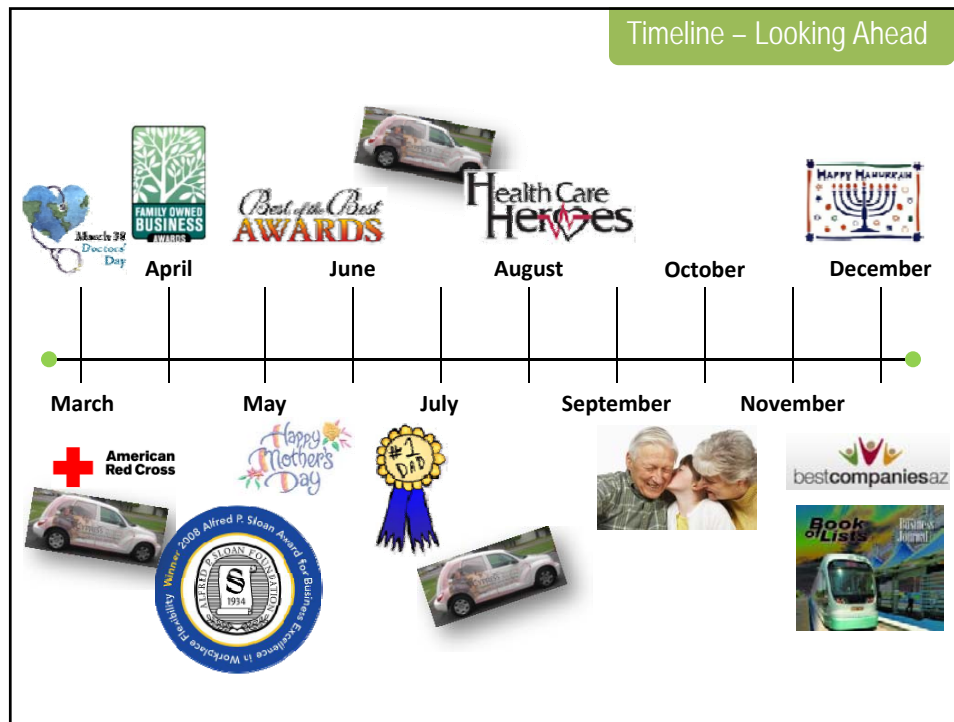
**Valentine's Day: February 14**



**Valentine's Day 2013**







## Marketing Budget

- How much should we spend and how much is it going to cost?
- In Consumer Products Goods business, marketing budget is calculated at **3%** gross revenue
- According to *Home Care Pulse* the number is **2.5%** of your revenue
- The way I see it, if your agency does \$2 million in revenue then it would be reasonable to spend **\$60,000 to \$70,000**

## Marketing Plan – Putting it Together

- You need to put your plan together **NOW**
- Realistically it should be completed in **October/early November** for the following year
- Get a sense of where you are going to finish the year and I would take 3% of that number to use to put your plan together
- **Remember to analyze your spends!**
- What if something comes up during the year?
  - Keep a reserve for such situations or be prepared to “pare back” a promotion or allocate some dollars from another “bucket” in your budget

## Examples of Cypress Marketing:

- Online – website, social media
- Advertising – print
- Videos
- Presentations/events/conferences
- Award opportunities
- Promotional Products
- Car Wraps
- Public Relations



# Website



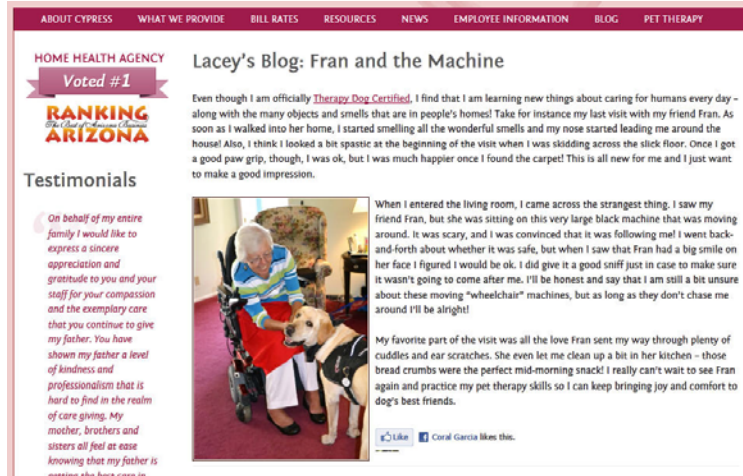
Direct **EVERYTHING** to your website  
[cypresshomecare.com](http://cypresshomecare.com)

# Website



Keep website content **current and relatable**  
[cypresshomecare.com/blog](http://cypresshomecare.com/blog)

# Website



Keep website content **current** and **reliable**  
[cypresshomecare.com/laceysblog](http://cypresshomecare.com/laceysblog)

# Social Media Presence



# Print Advertising

## Our Family, Our Community



For more than 18 years, Cypress HomeCare Solutions has been assisting families in Maricopa County and the Jewish Community. Jewish family-owned and locally operated, Cypress is dedicated to providing the highest quality and the most compassionate care for your aging loved ones.

We are proud to serve our local community and your family, so let us help you care for the ones you love, in the comfort of their own home.

We can help you help with:

- cooking
- shopping
- laundry
- personal care
- transportation

Call us today for your **FREE** in-home care assessment plan

**CYPRESS**  
HOME CARE SOLUTIONS  
compassionate care in your home

602.264.8009  
www.cypresshomecare.com

**RANKING ARIZONA**  
Voted #1 Home Health Agency for 2012

**YOU DO HAVE A CHOICE**

Serving the Valley since 1994  
Careivers Bonded, Insured and Background Checked

## Generations of Caring



Jewish parents are known for their determination to protect their children, keeping them healthy and safe.

Now, it is your turn to honor their legacy by providing your parents with the very best compassionate care in the comfort of their own homes.

We can help you help with:

- cooking • shopping • laundry • personal care • transportation

Call us today for your **FREE** in-home care assessment plan

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HOME CARE SOLUTIONS  
compassionate care in your home

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**YOU DO HAVE A CHOICE**

Serving the Valley since 1994  
Careivers Bonded, Insured and Background Checked

Jewish News of Greater Phoenix

## Caring for Israel



As caretakers of Israel, Mom and Dad have supported its existence as long as you can remember.

Now that both Mom and Dad are getting older and need an extra hand around the house, allow them to continue to remain independent through the very best compassionate care in the comfort of their own home.

We can help you help with:

- cooking
- shopping
- laundry
- personal care
- transportation

Call us today for your **FREE** in-home care assessment plan

**CYPRESS**  
HOME CARE SOLUTIONS  
compassionate care in your home

602.264.8009  
www.cypresshomecare.com

**RANKING ARIZONA**  
Voted #1 Home Health Agency for 2012

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## Thank You, Mom



Words could never describe how much your mom means to you. She kept you safe, stood up for you and always knew how to make you feel better when you were sick.

You still look up to your mom, and now that she is older and needs a little extra hand, allow us to help thank her by providing the very best compassionate care, in the comfort of her own home.

We can help you help with:

- cooking
- shopping
- laundry
- personal care
- transportation

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## Videos

- Recruitment
- Holiday
  - Cypress has been doing holiday videos for 5 years now, and each year we send it to more than 4,000 key influencers, family and friends
  - Save on paper (environmentally friendly), no postage, and a personal way to introduce your team to the recipient
  - Lives virally on the web

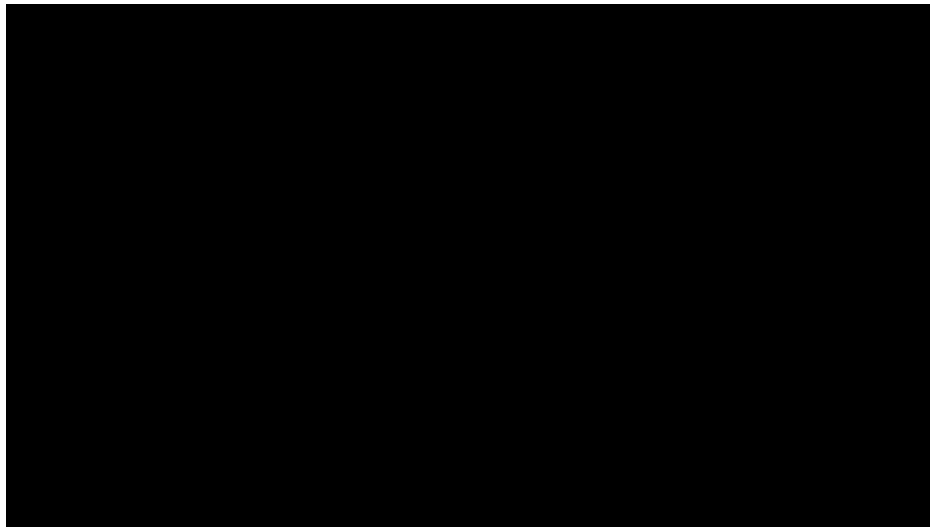
## Sense of Purpose



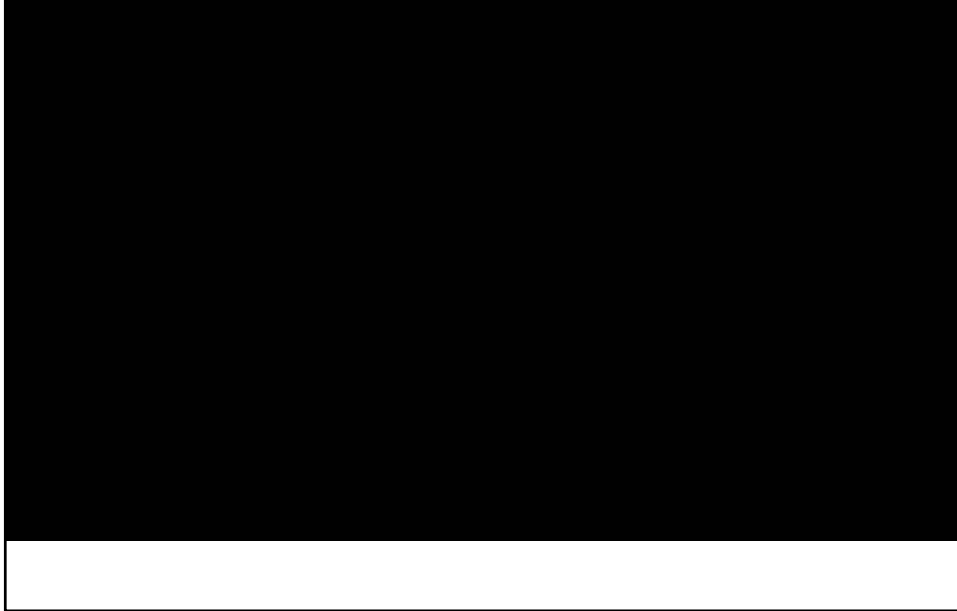
## **Extended Family**



## **2012 Holiday Video**



**2011 Holiday Video**



**2010 Holiday Video**



## Presentations/events/conferences



### *A Brighter Tomorrow Luncheon*

Sponsored by  CYPRESS  
HomeCare SOLUTIONS

Jewish Family & Children's Service  
cordially invites you to be our guest

Wednesday, March 3, 2010  
11:45 a.m. – 1:15 p.m.  
Phoenix Art Museum  
1625 N. Central Avenue  
Phoenix, AZ 85004

RSVP by February 24, 2010



Jewish Family and Children Services – Brighter Tomorrow Luncheon

## Presentations/events/conferences



2009 NAHC Strategic Planning

## Awards Opportunities

- Family Owned Business Award
- Health Care Heroes – Phoenix Business Journal
- Alfred P. Sloan for Business Excellence in Workplace Flexibility
- Gallup Great Workplace Award
- Better Business Bureau Ethics Award
- AZ Fast 15 Awards – Arizona Business Magazine
- **Industry Lists and Rankings**
  - Ranking Arizona (Cypress ranked #1 Home Health Agency for 2010 & 2012)
  - The Book of Lists
  - Best Places to Work – Phoenix Business Journal

## Awards Opportunities



2010 Spirit of Philanthropy Awards –  
Jewish Family and Children Services



“Companies to Watch” Award –  
Arizona Small Business Association



## Promotional Products

- Limit what you offer but at the same time make sure you have Tchotchke (pronounced: CHOCH key) that will be used and of course will be memorable
- Everybody has them, make sure you don't over do it - this gets charged to your marketing budget



## Car Wraps

- **Idea:** Park wrapped vehicles in hospital parking lots
- **Audience:** Referral sources and consumers
- **Description:** These are mobile billboards. Cypress sends fleet to high-traffic areas that serve as referral sources such as hospitals and lawyers offices, and park them in parking lots to raise brand awareness. Events are key too.



## Car Wraps



## Public Relations

- It's **FREE** – this will not impact your budget at all
- The local media loves **human interest stories**, and all of us have some really good stories!
- Find opportunities:
  - Newspapers
  - Magazines
  - Television spots

# Executive pushing legislation to regulate home care industry



BY JOLEMCULLOUGH  
jcm@azbizjournal.com

As people age and their ability to function on their own deteriorates, many end up in assisted living communities or nursing homes. In this economic climate, however, many are unable to sell their homes, making it impossible to afford that option. In such cases, companies like Cypress HomeCare Solutions LLP can assist people with their daily activities at home, said Bob Roth, managing partner for the Phoenix home care provider.

Home care differs from home health care in that there is no medical aspect involved. Caregivers at Cypress and other companies may not give clients medications or provide wound care because they lack the medical skills.

Home care is an unregulated industry, so some providers pass medications to clients, or they employ people who lack the proper training, Roth said.

"Consumer protection is the most important thing," he said. "Our (clients) are vulnerable; issues are potentially

happening every day." Roth's innovative ideas have made Cypress the only home care provider in the state with a training lab for caregivers. He also is a member of the Arizona Non-Medical Home-Care Licensure Coalition, which was created earlier this year. Its 13 members are working to introduce legislation in 2011 to license Arizona nonmedical home care agencies.

Similar bills in 2007 and 2009 failed. "We've learned twice now, so we want to take our time and craft some legislation that will make sense," Roth said.

Previous attempts have failed because of the lack of stakeholders, the lack of clarity about who would be affected, and the state's budget situation, he said.

"We're really pushing to get this legislation," he said. "We can be our own watchdogs, but who's watching some of these other people?"

Along with trying to help the industry, Roth enhances his own company by using new technology and offering a comprehensive training program for caregivers. All potential Cypress employees must go through a three-phase interview process: pass a 50-state background check and a pre-employment drug screening; be certified in CPR and first aid; and provide six references.

"We actually do reference checks," Roth said. "It blows my mind how many people say they do, but they don't."

## BOB ROTH

**TITLE:** Managing partner  
**COMPANY:** Cypress HomeCare Solutions LLP  
**MEMBER:** Arizona Non-Medical Home Care Licensure Coalition  
**GOAL:** Establishing state legislation to regulate the home care industry to protect those requiring assistance at home  
**WEB:** www.cypresshomecare.com, www.aznhc.org

Once hired, caregivers undergo two days of classroom and lab training. Lab practice includes learning how to move a person without injuring them and working with devices many people need to assist them in their daily lives. Caregivers also attend quarterly sessions to learn how to deal with factors such as dementia and Alzheimer's disease, said Scott Spangler, director of operations for Cypress.

Roth said legislation and better training are necessary for the future of this growing industry. With the first wave of baby boomers turning 65 in 2011, the health care system is going to be overloaded, he said.

"We've got this tsunami coming in 2011, and we need to be ready for it," he said. "There's not enough hospital beds; there's not enough nursing homes or assisted-living communities. Home care is going to be the only solution for everybody, and we're here, but we need regulatory oversight."

Phoenix Business Journal

### The Business Journal

People | Valley personalities

**Profile: Bob Roth**

**Old soul**  
Son turns family heartbreak into a mission to make a difference

**"You've got to be in it to help people. I know we're making a difference in people's lives."**

**101 NORTH**

**WE'VE EVOLVED WITH A FULLY REGULATED HEALTH CARE COMPANIES TODAY.**

**the business of caring**

Executive brings personal experience to Cypress HomeCare Solutions

BY MARK BAKER PHOTO BY CARL SCHULTZ

**H**ome care companies and caregivers are not the same as they were 10 years ago. Bob Roth, the managing partner of Cypress HomeCare Solutions, is a member of the Arizona Non-Medical Home-Care Licensure Coalition, which has 13 members. Roth is pushing for legislation to regulate the home care industry. He is also a member of the Arizona Non-Medical Home-Care Licensure Coalition, which was created earlier this year. Its 13 members are working to introduce legislation in 2011 to license Arizona nonmedical home care agencies.

## Lacey the Lab on Hero Central



## Getting Started

- Who are you?
- Analyze how you go to market.
  - Are you presently fishing in an Ocean or in a Barrel?
- Develop your Marketing Budget for the upcoming year.
  - We use 3% of our Revenue, what would that mean for you?
- Think about what will enable you to reach your Key Influencers

## RECAP


- Commitment from Management and Team to plan out your **MARKETING** plan for the year
  - Remember the old adage; If you “fail to plan, than you plan to fail”
  - Patient – try some new things to reach your “key influencers”
  - Upfront investment might be more, but **TRUE** savings and ROI will be realized down the road – Attracting New Clients
- Who are your Key Influencers?
- What is your Message? And how can the receiver of your message relate to it.

## Finally...don't forget to have some fun!



Lacey the Lab



 **Questions**

