

Engaging Top Performing Schedulers



Introductions

Stacey and Kire will be your facilitators for this session.

Kire
Madsen



Stacey
Buechler

Today's Agenda

- ◆ Scheduler Statistics
- ◆ Group Activity
- ◆ RAH Scheduler Pulse Surveys
- ◆ Soft Skills & Scheduler Training



For every 1 scheduler who quits, 5 caregivers will leave with them.

HCP Benchmarking Report



According to our calculations and the Center for American Progress, it costs **\$2,600 to replace a caregiver** and **\$6,500 to replace a scheduler**.

This means that losing one scheduler to preventable burnout could cost your agency around

\$19,500

Top 10 Scheduler Complaints

Data from 50 Schedulers - Aug. 2021

- 52%** 1. Caregiver/Client Matching
- 35%** 2. Handling Complaints from Clients/Caregivers
- 29%** 3. Time Management
- 29%** 4. Creating Schedules Based off Care Plans
- 19%** 5. Lack of Communication from Owners/Team Members
- 19%** 6. Identifying Training Gaps — For Matching/Scheduling
- 19%** 7. Support from Owners/Office Team
- 13%** 8. Lack of Self Care
- 6%** 9. Maintaining Confidentiality
- 6%** 10. Being the 'Face of the Agency' — First Responders



Group Activity

Before we start with the session, let's warm up a little with an **interactive** discussion:

To discuss with your groups:

.....

- How have you seen this in your agency?
- What are you doing (or would you do) to resolve the issue?
- How would you address this with the scheduler?
- What could you do proactively, to keep this issue from happening again?

01

Your scheduler isn't involved in the onboarding process.

02

Your scheduler doesn't have the time or resources to build long-lasting relationships with caregivers.

03

Your scheduler spends most of their time listening to complaints.

04

Your scheduler is overwhelmed trying to make everyone else happy.

05

Your scheduler is forced to rely on guesswork while matching caregivers to clients.

Top 5 Mistakes

That Lead to Scheduler Burnout

#1

Your scheduler isn't involved in the onboarding process

#2

Your scheduler doesn't have time or resources to build long-term relationships

#3

Your scheduler spends most of their time listening to complaints

#4

Your scheduler is overwhelmed trying to make everyone else happy

#5

Your scheduler is forced to rely on guesswork while matching caregivers to clients



01

Involvement in Onboarding

Group Discussion



Your scheduler(s) aren't involved in the onboarding process.



02

Building Relationships

Group Discussion

.....

Your scheduler(s) don't have the time or resources to build long-term relationships with caregivers.



03

Complaint Handling

Group Discussion



Your scheduler(s) spend most of their time listening to complaints.



04

Making Everyone Happy

Group Discussion



Your scheduler(s) is overwhelmed trying to make everyone else happy.



05

Matching

Group Discussion

.....

Your scheduler(s) is forced to rely on guesswork while matching clients and caregivers.

Scheduler Insights

.....

Winston Salem, NC

Agency Director

Jackie Brewer

Operations Manager

Shanita Dobson

Scheduler

Tyla Lynch



Scheduler Insights

.....

Central New Jersey

Training Manager

Beth Shalom

Scheduler

Sarah

Recruiter

Jennifer

How do you stay on top of ever-changing client/caregiver needs?



5 Ways Schedulers Impact Retention

1. Schedulers are the link to caregiver satisfaction
2. Schedulers recognize training gaps with confidence
3. They are experts in handling complaints
4. They build meaningful relationships with caregivers
5. Schedulers are the key to retention



Schedulers are the link to caregiver satisfaction



Top 10 Caregiver Complaints

1. Training

2. Communication

3. Pay

4. Office Staff Support

5. Scheduling

6. Recognition

7. Client/Caregiver Compatibility

8. Respect

9. Benefits

10. Care Plans

Data taken from text analysis on 50,000+ caregiver surveys since January 1, 2021.

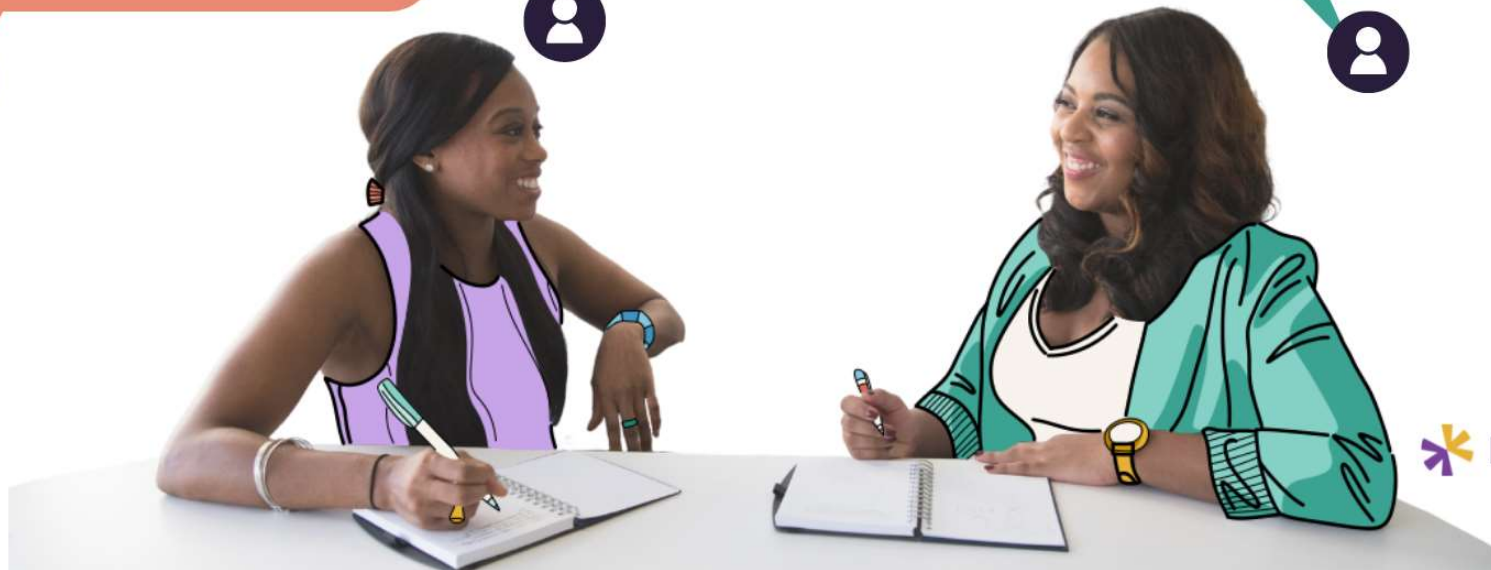
This list focuses on factors within your control.

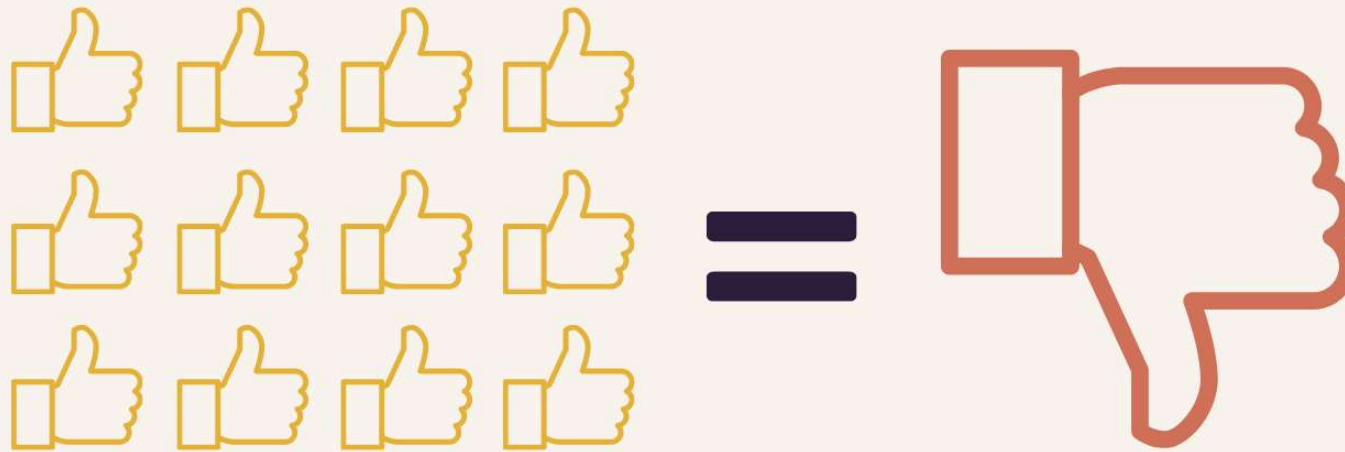
Caregivers Are Saying

"No one is ever available to answer my questions."

"They need to communicate better and be more organized."

"My schedule would change, but no one would tell me."





It takes 12 **positive experiences to make up for 1 unresolved **negative** experience.**

100% of the Schedulers We Surveyed Said They...



- Focus on customer service
- Aim for transparent communications
- Are proud of the assistance they provide to the community



**Schedulers recognize
training gaps with
confidence**

2



of employees believe that they lack the skills needed to do their job.



of organizations provide industry-specific training and development.



of employees agree to stay longer if the company invests in employee training.

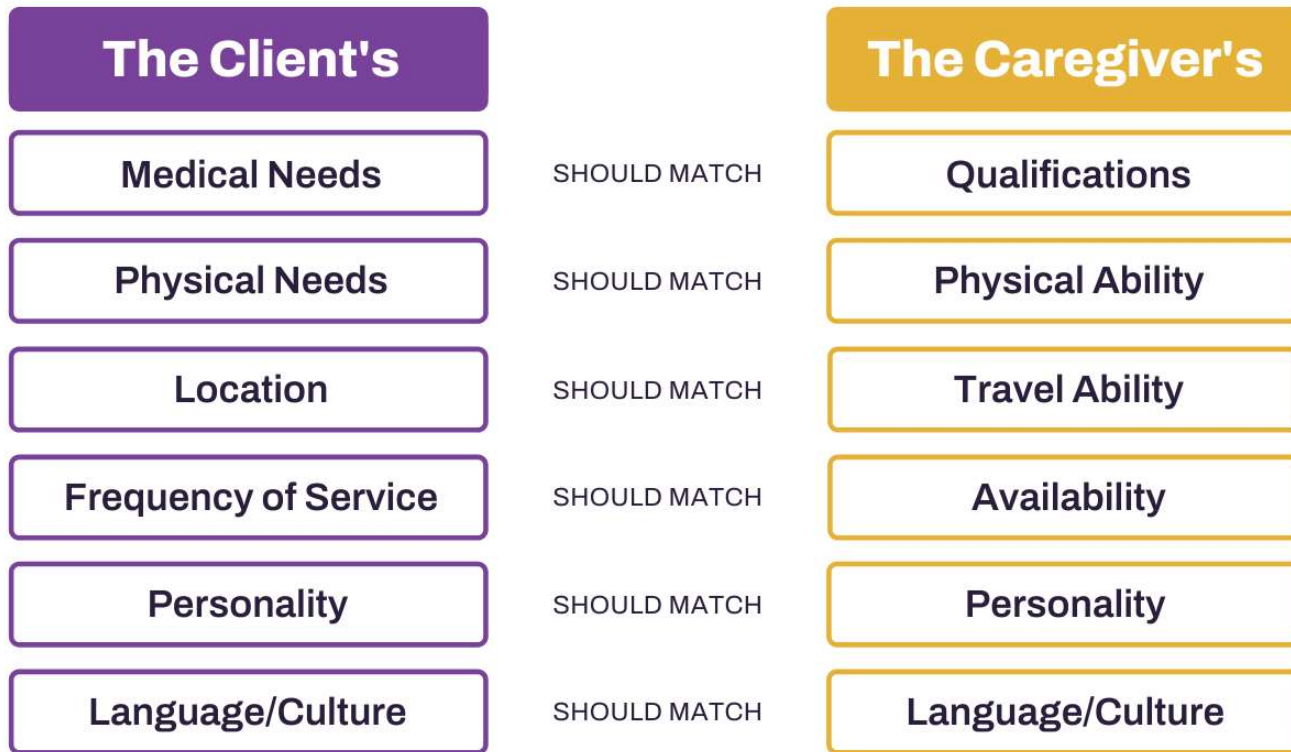
How Can Schedulers Recognize Training Gaps?

Schedulers should:

1. Pinpoint training gaps during the caregiver/client matching process
2. Identify training gaps using the care plan



Pinpoint Training Gaps While Matching



Schedulers Are Saying

"If they don't have experience with Alzheimers, we don't put them through that alone."

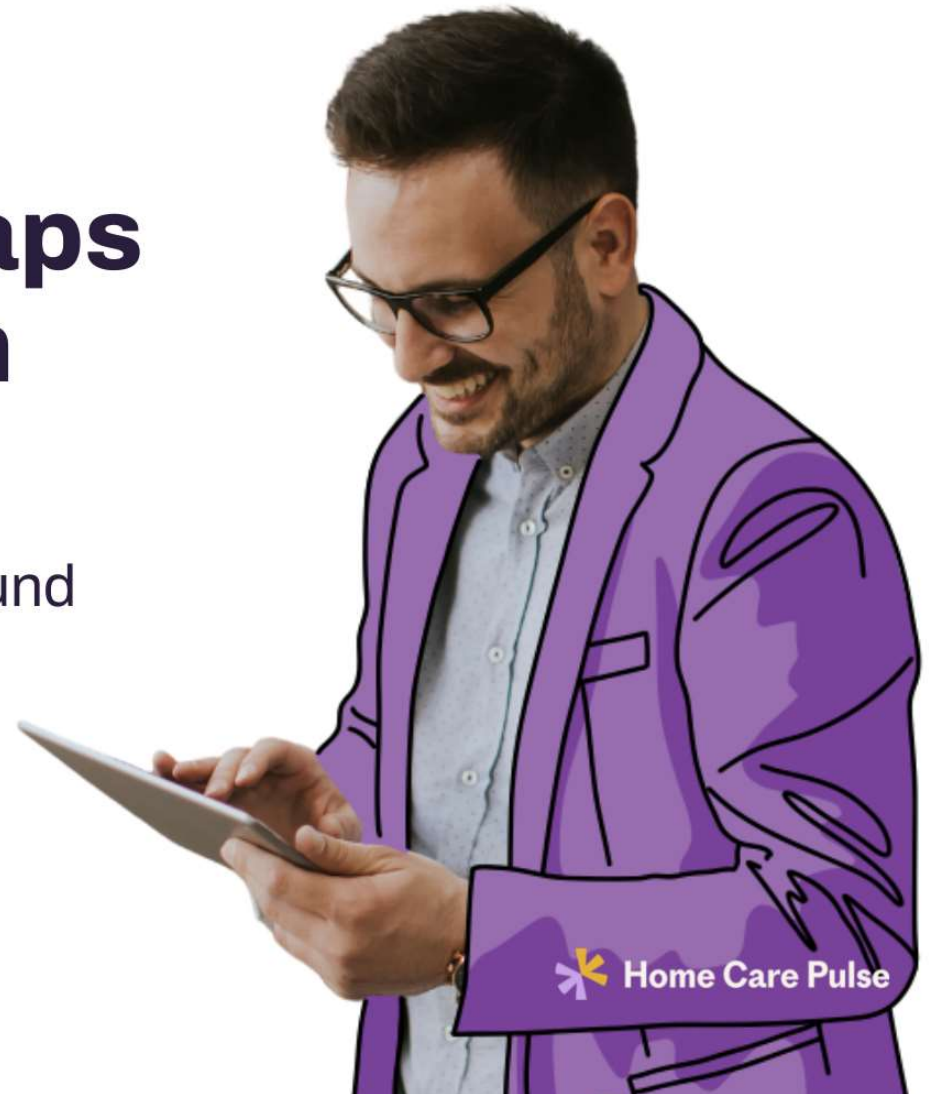
"Schedulers may have to move around different caregivers, but we manipulate the schedule, work on the puzzle until we have it all fit together and every client is happy."

"I will ask what hours and days we're looking for, and I'll see what I have that will match that. I then review the care plan."



Identify Training Gaps Using the Care Plan

1. Understand the role of the caregiver
2. Understand the caregiver's background
3. Connecting the resources





Schedulers are experts in handling complaints



Schedulers Are Saying

"You have to take everything seriously. No matter how large or small the complaint is."

"It's important to LISTEN and to get to the real reason for the complaint. People just need to be heard."

"Don't take complaints personally. Just be patient and let people vent."



The 5 General Reasons That People Complain

- ✗ Unmet Expectations
- ✗ Stress/ Frustration / Anxiety / Fear
- ✗ Pain
- ✗ Feeling Ignored
- ✗ Attention Seeking





of employers think 'people skills' are just as important as technical skills.



of employers offer soft skills training to their employees.

Companies who offer soft skills training have a 250% ROI (Return on Investment) due to higher productivity and retention.

1 Active Listening



- Hearing is passive. Listening is an active choice we make
- Active listening includes physical elements like eye contact and facial expressions
- It is important to remain neutral and non-judgmental as you listen
- Repeat the message back to the speaker to ensure you understood
- Ask questions to gather more information

2 Sincerely Apologize



- Apologizing is more than just good manners
- An apology demonstrates empathy and respect
- A sincere apology contains the 3 Rs:
 - **Responsibility**
 - **Regret**
 - **Remedy**

3 Solve the Problem

- If possible, solve the problem as soon as it arises
- Or, estimate a clear timeline for a solution
- Get support from other administrative team members as needed
- Keep the person informed throughout the resolution process



4 Express Gratitude

- Complaints contain valuable lessons
- Look for the lesson in each situation that arises
- Remember the 5:1 rule: for every complaint there are five people with the same issue who didn't voice the problem





Schedulers build meaningful relationships with caregivers

4

Building Relationships

1 Bonding with Caregivers



To build successful relationships, it's vital to be:

- Consistent
- Flexible
- Prompt
- Personal

Schedulers Are Saying

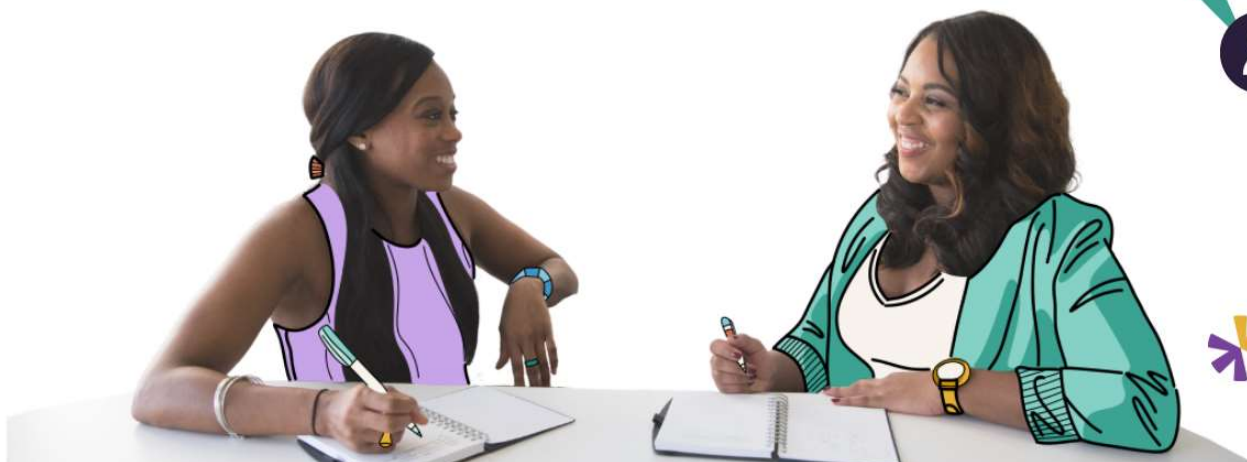
"Building relationships with caregivers is all about how you approach them. I work on coaching my team."



"A caregiver might talk to one scheduler and say no to a shift and then talk to another one they have a relationship with and say, 'OK, yes, I'll do it for you.' It's all about relationship building."



"It's important to be able to build a relationship over the phone. I try not to text my caregivers. I call or FaceTime them so they can hear my voice and/or see my face."



Building Relationships

2 Regular Check-In Calls with Caregivers

- Make a weekly connection to improve communication and trust
- Ensure everyone is aware of the upcoming week's schedule
- Ask for input/feedback from both caregivers
- Boost overall satisfaction by building and deepening relationships



Building Relationships

3 Participating in Hiring and Onboarding Caregivers

- Help newly hired caregivers feel supported and connected
- Make that first impression count
- Make sure caregivers know how to contact their scheduler
- Explain your agency's training policies
- Make sure caregivers know what to expect



Schedulers Are Saying

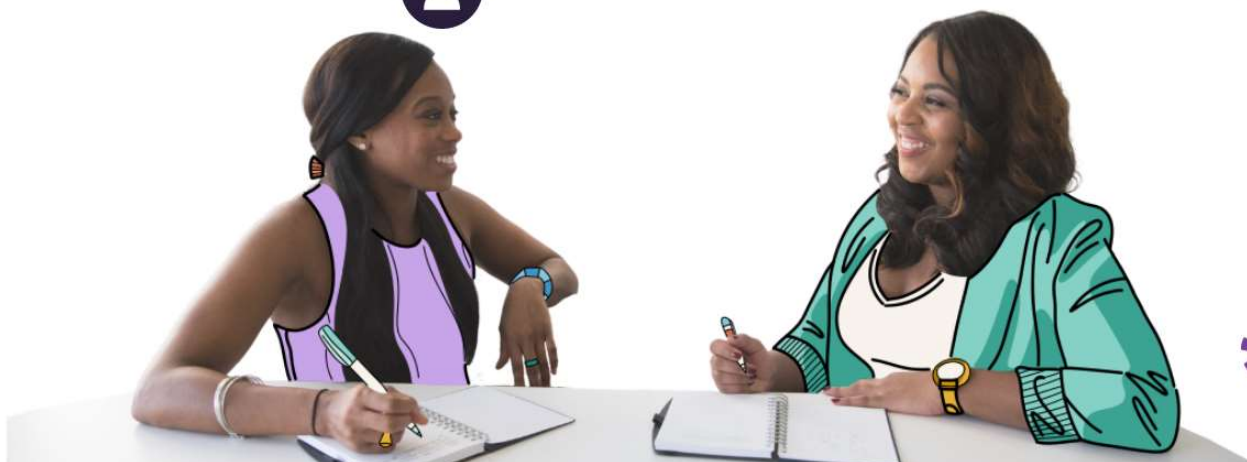
Caregivers know that we are advocating for them so they feel safe talking about what they don't know...but need to learn.



If a recruiter is out, I do have the ability to give a new caregiver an application, and walk them through the steps to apply. I can talk to them about personal care aide classes as well.



We have a big team and it's very close family knit. Caregivers often reach out to me and say "Hey! I have someone coming."





Schedulers are the key to employee retention



Retention

1 Provide Specific, Frequent Recognition

Encourage office staff to recognize caregivers for their hard work and accomplishment at spontaneous times, but also put systems in place to ensure that they consistently validate caregivers for their work.

Retention

2 Help Your Caregivers Feel Like Part of the Team

- Set the example for your staff by learning about each caregiver, remembering their names, and engaging with them.
- Consider posting an organizational chart somewhere public that has a picture of every caregiver with their name and other unique or interesting facts about them.

Retention

3 Communicate the 'Why' of Your Business

One of the most critical aspects of retention is sharing the vision of your company with your caregivers, and attracting/hiring caregivers who identify with your why.

- Invite your staff to collaborate with you in designating your agency's core principles and/or mission.
- Regularly communicate the why of your company with your office staff so that it remains fresh in their minds.

In Summary

- Identify the top reasons leading to Scheduler Burnout in your agency and work through them with your team
- Your schedulers are the link to client and caregiver satisfaction
- Help your schedulers recognize training gaps with confidence
- Equip your schedulers to be experts at complaint handling
- Create opportunities for your schedulers to build lasting relationships
- **Your Schedulers are the Key to Retention**

HCP Training

Scheduler Success Series

The industry's first training series created just for home care schedulers—a collection of courses on all the things a home care scheduler needs to know to find success in their role.



Courses Include:

- Understanding the role of the caregiver
- How to match clients with caregivers
- Handling conflict and complaints
- Maintaining confidentiality
- Understanding the care plan
- Relationship building with caregivers, clients, and families
- Time management
- Leadership skills

Get the Scheduler Success Series for FREE

www.homecarepulse.com/training/scheduler-success-series/



Live Discussion

Questions?

