

CASE STUDY

ClearDesk in Senior Care

How **Home Instead Orange County Coastal** attended to its increasing demand and real-time scheduling needs with ClearDesk.



CHALLENGES

Some of the **BIGGEST CHALLENGES** in the **Senior Care industry** are:

- **RECRUITING** highly-skilled, qualified caregivers
- **SCHEDULING** these caregivers appropriately to cover every customer's needs

With over 1200 offices worldwide, Home Instead is familiar with these industry struggles.

The challenges kept increasing as the company grew. Therefore, Nick Singh, owner of Home Instead Orange County Coastal for more than six years, **approached ClearDesk to find the BEST SOLUTION.**

After an initial discovery call, we identified the drivers of his two **main concerns**:



The **business demand** was greater than what the **recruitment team** could handle, which was straining the **Human Resources Manager**, that couldn't manage the pipeline on her own anymore.



Real-time scheduling and assigning the appropriate caregiver, especially after-hours, was a challenge. The scheduler had to be on-call most days after her work shift and was unable to consistently assign the best caregiver to each senior.

APPROACH

We decided the best approach was to assign a new remote team member to each of the struggling areas of the business.

We needed to hire a recruiter and a scheduler.

Criteria

We worked with Nick and the Home Instead team to build a criteria list and profile for each of these roles. With that, we then worked on a training program specific to the needs of the Home Instead franchise.

Training

The Home Instead training program was built to ensure the remote team member's success in their roles. It included the tools and terms they needed to know to understand how Home Instead operates and be immediately onboarded.

We recruited

**2 REMOTE TEAM MEMBERS,
Roanne and Marian, within EIGHT
BUSINESS DAYS**

Onboarding + Success KPIs

They both engaged in the ClearDesk Strong Start Program and the Home Instead Training. Within two weeks, they were fully onboarded and off to the races.

MARIAN YBANEZ

Recruiter

- ● ● ● ● HR Experience
- ● ● ● ● Professional English
- ● ● ● ● Excel Knowledge

ROANNE LOPEZ

Scheduler

- ● ● ● ● 10+ years in the BPO Industry
- ● ● ● ● Professional English
- ● ● ● ● Project Management



RESULTS

WHAT HAS MARIAN DONE?

Marian, our remote Recruiter with HR and customer relations experience handled the following:

- ✓ Marian **developed relationships** with the candidates
- ✓ Marian **built trackers for each step of the recruiting process**

With this, Nick could fully understand and manage the recruitment pipeline while attending to the increasing demand without straining the Human Resources Manager.

After 2 months,

7 **OUTSTANDING CAREGIVERS** were onboarded

on the Home Instead team to help new seniors and their families.

COST SAVING SOLUTION

Not only was ClearDesk able to provide remote trained team members, but Nick was also able to leverage meaningful cost savings.

FULL-TIME EMPLOYEE

College Educated FTE (California)

Annual Salary: \$55,000

Payroll Taxes + Benefits: \$8,125

Office Space: \$6,000

ANNUAL COST: \$69,125

VS.

FULL-TIME CLEARDESK REMOTE TEAM MEMBER

College Educated FTE (Remote)

Annual Salary: \$23,400

Payroll Taxes + Benefits: Included

Office Space: N/A

ANNUAL COST: \$23,400

WHAT HAS ROANNE DONE?

Roanne, our remote Scheduler with more than ten years of experience in project management handled the following:

- ✓ Roanne **quickly learned how to use ClearCare** (now WellSky)
- ✓ Roanne **worked hand in hand with the other scheduler to develop a more streamlined process**

The process Roanne built allowed them to schedule shifts in advance.

100% OF SHIFTS WERE SCHEDULED!

This process also helped increase consistency in the assigned caregiver for the senior's ease. Furthermore, Roanne worked an expanded on-call schedule to accommodate **urgent client requests**.

66% SAVINGS FOR YOUR BUSINESS

RESULTS

By understanding what success looked like for Nick and keeping in mind the industry-wide challenges he faced while Home Instead Orange County Coastal was growing, we recruited the perfect remote team members for his business.

Within two weeks, Marian and Roanne completed the Strong Start Program and the Home Instead training allowing them to succeed.

Results were **QUICK**
and **OPERATIONS IMPROVED**
everyday. By using ClearDesk
and the Home Instead training
program, Nick is set up for
future growth and success.



"We were simply beyond impressed with the first two remote staff we hired from ClearDesk. The Home Instead training and their commitment to our success KPIs created immediate alignment."

Nick Singh

*Partner and Chief Operating Office of
Home Instead Orange County Coastal*

