

Comfort Keepers Get More Done with Less Using ClearCare Reporting & Analytics



The Challenge:

Creating & Analyzing Reports to Grow Business While Streamlining Tasks

Reporting and analytics – the discovery and analysis of patterns found within collections of data – enable home care agency owners to make better business decisions. Ian Bongaardt, co-owner of five Comfort Keepers franchises in Pennsylvania, likes working with numbers, but over the years got frustrated at spending too much time manually searching for potentially valuable information from the meager data available to him.



“Reporting is a combination of information and accountability,” says Bongaardt. “A lot of the reporting supports accountability for our caregivers and for our office staff. For example, we base our morning meetings on our Activity by Administrator reports, as well as all of the notes. Are our caregivers getting the number of hours they want? For that we need a Caregiver Hours report. And of course, Revenue, Payroll, Profit Margin and Gross Profit Summary reports. All necessary to support and grow the business, but all involved a lot of time-consuming work because we had to track everything manually.”

The Solution:

Digitize the Business via the ClearCare Platform

After considering other options, Comfort Keepers ultimately decided to engage with ClearCare as a key solution in digitizing their business. In addition to an entire suite of features like Scheduling and one-click Billing & Payroll, ClearCare offers:

- Access to vastly more data than the company could previously access through other industry software
- Charts and dashboards that make it easy to “slice and dice” data to build custom reports
- The ability to chart the collected data across different time periods and identify important trends over time

“Due to increased pressures on gross margins, we need to be as efficient as possible.”

“Due to increased pressures on gross margins, we need to be as efficient as possible.”

The Solution (cont'd):

The Advantages of Going Digital

Over the past several years, technology has transformed nearly every aspect of entire industries, with no signs of slowing down. Digital services can now be delivered anywhere through smart devices. As Gartner, Inc., a leading global research and advisory firm, declared recently, "No industry will go untouched by digital transformation."¹

Home care is no exception: such tasks as planning, scheduling, billing, payroll, and generating caregiver reports are all managed more efficiently and easily. Many tasks are even transformed to a "one-click" process. Clients' expectations, too, have risen with the proliferation of digital services.

Now, ClearCare is taking the digital transformation of home care to the next level by providing, among other things, reporting and analytics capabilities to transform and help grow the business process itself.

"I'll give you an example of something we now use that we never had any information on before," notes Bongaardt. "A Lifetime Revenue for Referral Sources report. We now have the ability to grade our referral sources as A, B or C, and track how often we revisit them and keep in contact with them. We could never do that before.

"Now that everything is integrated and automated," he adds, "Even though we accomplish more, it still saves us at least several hours each week."

"Now that everything is integrated and automated... Even though we accomplish more, it still saves us at least several hours each week."

The Value:

Increased Efficiency with Daily Tasks & Organizational Insights to Promote Growth

With the ClearCare platform, Comfort Keepers has realized much greater efficiency in the performance of regular tasks like scheduling caregiver shifts and running payroll. By no longer having to do those tasks by hand, they save considerable time and effort while reducing human error.

At the same time, the collection and storage of massive amounts of data like birth dates, monthly birthdays and caregiver certification expiration dates enable reports that they use to personalize offerings and enrich their clients' experience.

As Bongaardt notes, "We're doing so much more than we were doing before, and because it's automated, it takes a lot less time. We're freed up so we can concentrate more on conducting our business. And there's no doubt that we're now making better informed decisions."

"We're doing so much more than we were doing before, and because it's automated, it takes a lot less time. We're freed up so we can concentrate more on conducting our business. And there's no doubt that we're now making better informed decisions."

San Francisco-based ClearCare provides the industry's leading home care technology, an all-in-one digital platform with best-in-class tools that help grow in-home care agencies while simultaneously managing caregivers and optimizing operations.

¹Source: <https://www.gartner.com/en/conferences/content/digital-top-trends>