HOME CARE MULTIPLIER

Grow Stronger • Scale Smarter • Build Value

HOME CARE AGENCY GROWTH AND VALUE SCORECAR

Assess the five business capabilities that support stronger growth, smarter scale, and lasting enterprise value.

GROWTH | LEADERSHIP | AI & AUTOMATION | PROFITABILITY | BUSINESS VALUE

A practical self-assessment for home care agency owners. Presented by Dale Corpus | Home Care Multiplier.

Your score is not a valuation. It is a starting point for identifying the operating constraints and value gaps that deserve attention next.

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START HERE

How to Use This Scorecard

Rate each statement based on how consistently it is true today — not what you intend to implement later. Complete the assessment in 15 to 20 minutes, then use your lowest pillar score and greatest business risk to choose one priority for the next 90 days.

1 RATE HONESTLY Circle one response from 1 to 5 for every statement.

2 TOTAL EACH PILLAR Add the six ratings in each section. Every pillar has a maximum score of 30.

3 CALCULATE YOUR TOTAL Add all five pillar scores. The overall maximum is 150.

RATING SCALE
4 CHOOSE ONE PRIORITY Start with the weakest pillar or the gap creating the greatest risk to the business.

1 Not true — this capability is absent or unreliable.

2 Rarely true — it happens inconsistently and usually depends on individuals.

3 Partly true — a foundation exists, but execution is uneven.

4 Mostly true — the capability is reliable with identifiable gaps.

5 Consistently true — the capability is measured, repeatable, and durable.

PILLAR 1

GROWTH

Build predictable demand and delivery capacity

Rate each statement from 1 to 5

PILLAR SCORE __ / 30

1 = Not true 2 = Rarely 3 = Partly 4 = Mostly 5 = Consistently true

01	We generate qualified private-pay inquiries through more than one reliable channel.	1 2 3 4 5
02	No single referral source controls an unhealthy share of our new-client pipeline.	1 2 3 4 5
03	We track inquiries, assessments, conversions, starts of care, and lost opportunities.	1 2 3 4 5
04	Our sales and follow-up process is consistent rather than dependent on the owner.	1 2 3 4 5
05	Caregiver capacity usually supports the clients and hours we are trying to add.	1 2 3 4 5
06	We can explain which growth activities produce the strongest clients and returns.	1 2 3 4 5

25-30 Strength | 19-24 Developing | 13-18 Constraint | 6-12 Immediate priority

What stands out? _____

PILLAR 2

LEADERSHIP

Build accountability and capacity beyond the owner

Rate each statement from 1 to 5

PILLAR SCORE __ / 30

1 = Not true 2 = Rarely 3 = Partly 4 = Mostly 5 = Consistently true

01	Critical functions have a clearly accountable leader with measurable expectations.	1 2 3 4 5
02	Routine operating decisions are made without waiting for the owner.	1 2 3 4 5
03	Leaders review performance, address recurring problems, and follow through consistently.	1 2 3 4 5
04	Core workflows are documented, followed, and improved when problems repeat.	1 2 3 4 5
05	Client, caregiver, and referral relationships belong to the company — not only the owner.	1 2 3 4 5
06	The owner could disconnect for seven days without essential functions stopping.	1 2 3 4 5

25-30 Strength | 19-24 Developing | 13-18 Constraint | 6-12 Immediate priority

What stands out?

PILLAR 3

AI & AUTOMATION

Use technology to remove friction without weakening care

Rate each statement from 1 to 5

PILLAR SCORE __ / 30

1 = Not true 2 = Rarely 3 = Partly 4 = Mostly 5 = Consistently true

01	We have identified repetitive administrative work that can be simplified or automated.	1 2 3 4 5
02	Our technology systems share reliable information instead of creating duplicate work.	1 2 3 4 5
03	Automation supports timely follow-up with prospects, clients, caregivers, and staff.	1 2 3 4 5
04	We track whether technology saves time, reduces errors, lowers cost, or improves conversion.	1 2 3 4 5
05	A responsible person reviews automated outputs and protects privacy, security, and compliance.	1 2 3 4 5
06	Our technology decisions follow a defined operational need rather than novelty or hype.	1 2 3 4 5

25-30 Strength | 19-24 Developing | 13-18 Constraint | 6-12 Immediate priority

What stands out? _____

PILLAR 4

PROFITABILITY

Turn activity and revenue into durable economics

Rate each statement from 1 to 5

PILLAR SCORE __ / 30

1 = Not true 2 = Rarely 3 = Partly 4 = Mostly 5 = Consistently true

01	We review revenue, gross margin, operating profit, and cash flow on a regular schedule.	1 2 3 4 5
02	Our pricing reflects labor costs, overtime exposure, service complexity, and target margin.	1 2 3 4 5
03	We understand which clients, schedules, and service types strengthen or weaken margin.	1 2 3 4 5
04	We monitor overtime, unfilled shifts, cancellations, and other sources of margin leakage.	1 2 3 4 5
05	Overhead and hiring decisions are tied to clear capacity, performance, or return targets.	1 2 3 4 5
06	The agency can fund necessary growth without creating recurring cash-flow emergencies.	1 2 3 4 5

25-30 Strength | 19-24 Developing | 13-18 Constraint | 6-12 Immediate priority

What stands out?

PILLAR 5

BUSINESS VALUE

Create a business that is durable and transferable

Rate each statement from 1 to 5

PILLAR SCORE __ / 30

1 = Not true 2 = Rarely 3 = Partly 4 = Mostly 5 = Consistently true

01	Financial statements and operating metrics are timely, accurate, and easy to explain.	1 2 3 4 5
02	Revenue is reasonably diversified across clients, referral sources, and payer relationships.	1 2 3 4 5
03	Caregiver retention, service quality, compliance, and reputation are actively managed.	1 2 3 4 5
04	Key systems, contracts, records, and processes could transfer to a future owner.	1 2 3 4 5
05	The agency has credible growth opportunities that do not depend entirely on the current owner.	1 2 3 4 5
06	We understand the risks and improvements most likely to affect the agency's future value.	1 2 3 4 5

25-30 Strength | 19-24 Developing | 13-18 Constraint | 6-12 Immediate priority

What stands out? _____

BRING IT TOGETHER

Your Results

Transfer each pillar score below. Your total provides directional context; the pattern across the five pillars is usually more useful than the total alone.

PILLAR	CAPABILITY	SCORE
1 Growth	Build predictable demand and delivery capacity	**__ / 30**
2 Leadership	Build accountability and capacity beyond the owner	**__ / 30**
3 AI & Automation	Use technology to remove friction without weakening care	**__ / 30**
4 Profitability	Turn activity and revenue into durable economics	**__ / 30**
5 Business Value	Create a business that is durable and transferable	**__ / 30**
TOTAL GROWTH & VALUE SCORE		**__ / 150**

SCORE GUIDE

120-150 Strong platform
Strong fundamentals are present. Focus on the few gaps that could limit resilience, transferability, or the next stage of growth.

90-119 Growing with material gaps
The agency has traction, but one or more weak pillars may be creating risk, margin pressure, or owner dependence.

60-89 Owner-dependent or inconsistent
Important capabilities rely on individual effort rather than durable systems. Prioritize the weakest or highest-risk pillar.

30-59 Fragile foundation
Stabilize demand, delivery capacity, accountability, financial visibility, and basic systems before pursuing aggressive expansion.

MAKE IT PRACTICAL

Your 90-Day Priority

Do not try to repair every gap at once. Choose the constraint that most directly affects cash, capacity, owner dependence, or future value.

1. MY PRIORITY PILLAR

(Growth / Leadership / AI & Automation / Profitability / Business Value)

2. THE SPECIFIC CONSTRAINT

What is happening, and why does it matter now?

3. THE 90-DAY OUTCOME

What measurable result would demonstrate meaningful progress?

4. THE FIRST THREE ACTIONS

What will be done, by whom, and by when?

5. THE NUMBER I WILL WATCH

Which leading or financial indicator will show whether the plan is working?

NEXT STEP

Turn the Score Into a Strategy

A scorecard can reveal a pattern. It cannot, by itself, determine which constraint deserves attention first or which solution fits your agency.

HOME CARE AGENCY GROWTH & VALUE CLARITY SESSION

A focused, paid working session for owners who want an outside perspective on the business and clear priorities for its next stage.

- ¡ Review your five pillar scores.
- ¡ Identify the most important growth and value constraints.
- ¡ Clarify the top three priorities.
- ¡ Leave with a focused next-step plan.

Learn more or request a session

ABOUT HOME CARE MULTIPLIER

Home Care Multiplier is an educational media and resource platform for home care agency owners. It connects growth, leadership, responsible automation, profitability, and business value so owners can build stronger businesses that depend less on them.

Hosted by Dale Corpus — business strategist and connector within the senior-care ecosystem.

IMPORTANT NOTE

This scorecard is an educational self-assessment, not a formal business valuation, appraisal, legal opinion, accounting opinion, investment recommendation, or guarantee of results. Consult appropriately licensed professionals for decisions involving valuation, transactions, financing, tax, legal, employment, or regulatory matters.

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