



## **Contact Information - Who Gets Lead Referrals**

Date: November 07, 2013  
Name: Craig Sobel  
Address: 1757 E. Baseline Road Bldg 6, Suite 124 , Gilbert, AZ 85233  
Phone: 813.425.2020  
Fax: 480.659.7713  
Email: brittschroeter@synergyhomecare.com, leads@synergyhomecare.com, territories@synergyhomecare.com  
Email to send leads to: leads@synergyhomecare.com  
Website: www.synergyhomecarefranchise.com, www.synergyhomec  
FranNet Referral Fee: \$29,000 (single) / \$44K (double)  
Promotion: N/A

## **Business Basics**

Industry	Non-Medical Home Care	Year started franchising	2005
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<b>Year business started</b>	2001	<b>Franchise units open</b>	280
<b>Number of Company units open</b>	0	<b>Investment Range \$</b>	\$56,125.00 - \$135,850.00
<b>Franchise fee \$</b>	\$45K first territory, \$35K second territory purchased at the same time.	<b>Required liquid capital \$</b>	55000
<b>Required net worth \$</b>	250000	<b>Royalty</b>	5%
<b>Industry size \$</b>	\$57.6 Billion	<b>Available in Canada/ Internationally</b>	Yes/No
<b>SBA Registry?</b>	Yes	<b>VetFran/Minority Fran</b>	Yes/No
<b>Offer Group Health Insurance?</b>	Yes	<b>State Registrations</b>	All But Louisiana
<b>In House Financing?</b>	No	<b>Buyer Motives</b>	A/B/S

Currently not offering franchises in: Louisiana  
Sold out: none

## **Business Features**

Synergy HomeCare is one of the fastest growing franchisors in the nation's \$84 billion a year non-medical home care industry. The concept boasts a perfected system for delivering premier non-medical homecare services to clients of ALL ages.

There are now over 34 million people in the U.S. over age 65 approximately 12% of the population. In 25 years, this age group will grow to over 70 million. With our established franchise concept, you can help provide valuable non-medical home care services - services that directly impact the quality of life of your clients and their families.

The owners choose one of three roles right out of the gate

1. Community Liaison – being the face of the brand
2. Human Resources – hiring, training, managing –OR–
3. CEO role, hire and manage both of positions above day one.

Ideal single/multi-unit candidates are caring individuals with the desire to help others. They are entrepreneurial, competitive, and goal oriented with excellent communication skills. Marketing and sales as well as management experience is preferred, but no health care or medical experience is needed.

- Excellent communicative skills
- Marketing, sales and networking experience hit ground running and are preferred
- Can lead and manage employees successfully. Manage MANAGERS!!!!
- No medical or healthcare background required

The average office begins with two employees (the franchise partner and one employee). They will help you find local talent for potential office staff. And they assist you in getting your caregivers. Systematic, proven system to find the caregivers. They have a group health insurance plan for their franchise partners and for employees and caregivers.

Each territory is based on at least 20,000 seniors. Territories are defined and protected based on zip codes.

We are registered in all states and have availability throughout the country. Under our model single/multi-unit franchisees can operate up to 3 territories from one physical location.

Our training program ensures that each franchise partner has the knowledge and tools needed to start and grow their own Synergy HomeCare franchise. Franchisees are assigned a franchise start-up representative or Regional Developer, provided with a startup checklist and pre-class workbook to ensure a smooth grand opening and launch. We host Annual Franchise Meetings, regular educational webinars and weekly communication conference calls. Our Founder and CEO is one of the founding board members of the Private Duty HomeCare Association, the governing association out of Washington DC which keeps us up to date on everything going on with the industry.

### **Item 19 shows average revenue**

3-4 years Average gross sales of \$830,756K

5-7 years Average gross sales of \$1.15M

Over 8 years Average gross sales of \$1.93M

### **Competitive Advantages**

- **All ages**
  - o Some agencies only service seniors; we work with all ages
  - o Children, handicapped and disabled, cancer/surgery recover, mothers newborns
- **Multiple payor sources:**
  - o Private Pay
  - o Insurance: long term care policies

- o Staffing and Assisted Living Facility Placement
- o Contract: Medicaid and VA benefits
- o Hospital: Sitter Care
- o Accountable Care Organizations
- o National Accounts
- o Employer Assisted Programs: fortune 500 companies and other companies. (Back-up Respite and Child Care)

• **Training**

- o Four to six weeks initially: start-up checklist, pre-class workbook, regularly scheduled conf calls
- o One week at corporate headquarters
- o Online home care / caregiver training. Hundreds of hours. Module based. Trackable. Test's to ensure retention of info. Advance Training Classes on-line

• **Ongoing Support & Marketing:**

- o In-house Advertising Agency
- o Synergy 360: Marketing Strategy and Plan assistance, Marketing Manual
- o Regular Synergizer Calls to supplement Marketing efforts
- o Marketing materials, collateral and advertisement library, custom pics
- o Monthly educational webinars, Training video library
- o National referral accounts; partnerships (workers comp, EAP, insurance...etc.)
- o National Website. Local Websites, SEO, Blogging
- o Co-operative Advertising
- o e.newsletter, social media
- o Medical Alert program
- o Directory Syndication and Management
- o Superior PR Campaigns

• **Office**

- o Not home based
- o Executive Suite or commercial space (300 – 500 sq. ft)
- o easy for Caregivers to find & access & park

• **Advanced Technology:**

- o Scheduling software:
  - ? Calendar, keeps track of appointments
  - ? Cloud based: access anywhere you have internet
  - ? user login for caregivers and clients
  - ? tracks CG skills & client's needs (smoker, pets, distance, hobbies, interests)
  - ? email notification of schedule to caregivers
  - ? easy to perform payroll/billing
  - ? Telephony. Caregivers clock in and out on clients phone

- o private intranet 24x7
  - ? forms, policies, procedures, career opportunities, personal web site page
- o Marketing, Sales and Advertising tracking
  - ? Track marketing efforts, referral sources, advertisements effectiveness
  - ? Where do your key referrals come from
  - ? Effectiveness of your print media
  - ? Who have you visited, when do you need to visit again
  - ? Track your closing rates: inquiries, home assess, service
- o Web site: new, key content, SEO support, local web site, blog, customizes info
- o Social Media: control center to manage your social media; corporate support
- **Protected Territory**
  - o Over 20,000 seniors
  - o We will provide demographics and map of territory
- **SUPPORT:**
  - o 4 to 6 5 weeks of training with a personal coach
  - o One week training at Franchise Support Center in Phoenix, AZ
  - o Local training at your site
  - o detailed and extensive business plan once a franchisee
  - o advanced technology (in house software engineer, private internet 24/7 access, web-based software included, invoicing software, scheduling software)
  - o Marketing support: national PR firm retained for marketing and advertising with major media, marketing plan created during initial 5-day training, marketing manual trained during office start up, series of radio / TV commercials, graphic designers support local ads.
  - o In house advertising agency.
  - o Local marketing and supports Franchise Partners through Synergy 360.

We offer weekly Webinars where existing Franchise Partners review their Profit and Loss statements and review financial questions to help candidates understand the break even and profit margins.

## **Recession Resistant**

There are now over 34 million people in the U.S. over age 65, approximately 12% of the population. In 25 years, this age group will grow to over 70 million. Eight out ten of the almost 13 million Americans that need some sort of assistance today would prefer to receive this care in their own homes rather than in an assisted living facility or nursing home. These numbers continue to increase as the baby boomer population is reaching an age where they more consistently need our services.

## **Issues and Ambushes**

- Competition. See script “Why Synergy?” for exact verbiage on how to answer the question of competition and “WHY SYNERGY?”
- Staff Intensive. Yes. This is a significant business and requires proper staffing. You will have a key team that helps you with H.R. You are more the C.E.O. and Synergy helps hire, proven, successful H.R. folks, ideally from the industry.

## **Hooks and Hangers**

- Recession resistant
- #1 growing industry/business to get into catering to the exploding baby boomer population
- Low start up costs
- Turn key solution
- Superior training by corporate staff with over 100 years of direct industry experience
- Technology driven providing differentiation and efficiencies
- Group Health Insurance Program for Franchise Partners and their staff

## **Franchisor Candidate Sales/Discovery Day Process**

- Initial call
- Introduction Webinar
- President's Webinar "Why Synergy"
- CEO / Founder Webinar
- FDD review
- Franchisee validation including weekly P&L reviews from existing franchisees
- Software Demo Webinar
- Discovery Day (May or may not be a signing event depending on the candidate)