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# Serving Seniors

**T**he trends reveal an abundance of new opportunities for entrepreneurs who want to combine caring with nurturing. Baby boomers—members of the generation born between 1946 and 1964—have already started receiving Social Security retirement benefits, and the U.S. Census Bureau

estimates the 65 and older demographic will grow faster than the total population in every state. The National Association of Area Agencies on Aging estimates by the year 2030, one in five people in the United States will be over the age of 65. The elderly population is increasing at nearly twice the rate of the general population—the 85-plus segment is projected to swell to about 19 million by 2050.

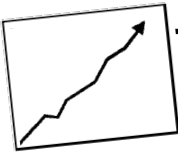
The evolving needs of older generations are having a major influence on what resources are necessary to prepare for the social and economic impact of the “senior boom.” Considering starting a business serving this market? Then you must know how urgent the need is for senior services. Jacqueline (Jacke) S. Dollar of Easy Aging, Geriatric Case Management Services, says that national demographics demonstrate the need for a variety of senior services. “Most seniors want to age-in-place in their own homes,” she says. “Today’s boomers are interested in engaging in their own retirement and are willing to pay for a professional to assist their parents.”

As people grow older, their needs and lifestyles change. There comes a time when even healthy, able-bodied seniors want to move from their larger homes into smaller ones that are easier to care for, or they may consider retirement communities. As their physical abilities naturally decline, seniors who want to stay in their own homes look for outside assistance with daily tasks, such as preparing meals, housekeeping, and managing personal hygiene. Seniors who are no longer able to drive may seek out reliable transportation to medical appointments, social functions, or shopping expeditions. And when seniors are no longer able to live alone, they may move in with family members or relocate to assisted living facilities. Almost 6.5 million seniors currently need assistance with their daily activities, and this number is expected to double by 2020.

On the other hand, seniors are healthier now than people of the same age were 30 years ago. Wellness for seniors has become an important issue in our society. As human longevity increases, there is a keen desire to remain healthy and independent for as long as possible. These active seniors have time on their hands and disposable income in the bank, and many want to travel to interesting and exotic places.

Tom Mann of TR Mann Consulting (TRMann.com), a full-service marketing and advertising agency that specializes in the senior market says the opportunities for working with the mature market are staggering. Between 2012 and 2060, the population aged 65 and older is expected to more than double from 43.1 million to 92.0 million. “When you consider these are the people who hold the bulk of the country’s money and are undergoing significant life changes, it becomes clear that they will drive the lion’s share of our economy,” he says.

All these trends mean opportunity for savvy entrepreneurs who want to start businesses serving this lucrative and growing market. Senior relocation specialists help their older clients with moving and downsizing. Home care, home health-care, and senior day-care operations all provide services to help people live at home for as long



### Stat Fact

According to the Administration on Aging (aoa.gov), the older population—persons 65 years or older—numbered 35.6 million in 2009, representing 12.9 percent of the U.S. population, or about one in every eight Americans. By 2030, there will be about 72.1 million older persons, more than twice their number in 2000.

as possible. And a travel agent who specializes in making arrangements for seniors is just the ticket to send them off on a fun-filled adventure.

Dollar advises entrepreneurs to research what's already available in the community and decide how you and your senior service will be better, different, and provide a niche not already met. "Start slowly," she says. "Have a mentor who's been in practice for several years and keep your day job until you're profitable."

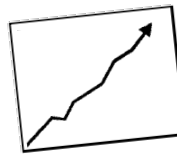
When you serve seniors, you typically wear many hats—and often more than one at a time. We'll help you discover the ones that fit the

best by showing you how to design a business that complements your talents and your demographics.

You may already know what type of senior services business you want to start, or you may still be exploring your options. In this guide you'll find the information and tools you need to start a senior adult day-care center, a senior relocation business, a home care or home health-care business, a senior concierge service, a senior transportation service, or a senior travel service.

We'll start with an overview of the market, look at the specific services you'll want to consider offering, and then go through the step-by-step process of setting up and running your new venture. You'll learn about basic requirements and startup costs, daily operations, and what to do when things don't go according to plan. We'll discuss how to find, hire, and keep good employees. Plus, you'll gain a solid understanding of the sales and marketing process, as well as how to track and manage the financial side of your business.

The best way to read this book is from beginning to end, and don't skip any chapters—even if you feel some may not apply to you or the type of business you want to start. For example, you may decide that you want to zero in on senior transportation, but if you also read the chapter on senior adult day-care businesses, you may find some good ideas on how to interact and network with those centers. Or you may decide to blend one or two of the concierge services with your senior relocation or travel business.



### Stat Fact

As part of their retirement planning, many of today's middle-aged baby boomers are "unretiring" by starting businesses that they intend to sell in 10 to 20 years. They plan to use the revenue from the sale of their company as retirement income.

What you won't learn is how to get rich quick or become an overnight success. Being an entrepreneur requires hard work, dedication, and commitment. In addition, working with seniors can be challenging; it requires empathy, patience and understanding of their special needs. But it can also be tremendously rewarding—monetarily and personally—as you discover what a tremendous difference you can make in someone's life.

## The Pros and Cons of Franchising

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Franchising can be a great way to start a new business because even though you are in business for yourself, you're not alone. You can start your new venture with a proven working model, an enthusiastic team of go-getters, and comprehensive hands-on training.

### Here's How It Works

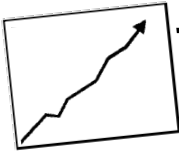
In a nutshell, the franchisor lends his trademark or trade name and a business model to the franchisee, who pays a royalty and often an initial fee for the right to do business under the franchisor's name and system. The contract binding the two parties is the franchise, but that term is also used to describe the business the franchisee operates.

The best part is the franchisor has already worked the kinks out of the system and is available to help franchisees when new challenges arise. According to the Small Business Administration, most businesses fail from lack of management skills. This is less likely to happen with a franchised business, because your franchisor is there to guide you through the maze of business ownership.

Typically you think of fast food and restaurants when you think of franchising, but virtually every business form has the potential to be franchised, and there are a number of franchised businesses that target seniors. In fact, once your business is established, you may want to consider growing it by franchising your concept.

### Here Are the Cons

While there are many benefits to owning a franchise (security, training, and marketing power), there are some drawbacks. Perhaps the most significant is the cost of a franchise. The initial franchise fee can run anywhere from a few thousand to several hundred thousand dollars. Then you have continuing royalty payments to the franchisor which are based on the weekly or monthly gross income of your business. Additional expenses may include promotional and advertising fees, operating licenses and permits, insurance, and other costs of running a business.



### Stat Fact

A recent study conducted by PricewaterhouseCoopers, found that the franchising sector generates 18 million jobs in the United States alone and yields \$1.53 trillion in economic output.

Another big drawback is that you have to give up some of your independence. Each franchise is different with how firm their conditions and requirements are; however, you will be bound by the contract to follow and implement the rules and procedures established by the franchisor. For example, if you neglect to pay your royalty fees or misbehave by not meeting performance standards, your franchise could be terminated and you may lose your investment. So, if you like to make your own decisions and

“do your own thing,” a franchise may not be right for you.

## Before You Buy

**D**oing your homework before buying a franchise is essential. You’ll be making a huge financial commitment, so you need to be sure the business suits you.

The International Franchise Association recommends that you investigate the following points:

- The type of experience required
- The business itself (you need a complete understanding of it)
- The hours and personal commitment necessary to run the business
- Who the franchisor is, what its track record has been, and the business experience of its officers and directors
- How other franchisees in the same system are doing
- How much the startup costs are (the franchise fee and other startup costs)
- How much you’re going to pay for the continuing right to operate the business (royalties)
- If there are any products or services you must buy from the franchisor, and how and by whom they are supplied
- The terms and conditions under which the franchise relationship can be terminated or renewed, and how many franchisees have left the system during the past few years
- The financial condition of the franchisor

You also have no control over how the franchisor operates, and the corporate office can make decisions that you may not agree with or that may even reduce your profitability. That's why it's so important to thoroughly research a franchise; you want to see a positive operational pattern before making a commitment.

Much of the information you'll need about a franchise will be provided in the form of a document known as the UFOC, or Uniform Franchise Offering Circular. Under Federal Trade Commission (FTC) rules, you must receive this document at least 10 business days before you are asked to sign any contract or pay any money to the franchisor.

## Buying an Existing Business

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An alternative to buying a franchise or to starting your own senior services business is to take over an existing operation. It may seem like an attractive and simple shortcut to skip the work involved in building a business from scratch and get started in an operation that's already equipped and generating revenue, but you should approach this option with caution.

You'll find a variety of businesses for sale advertised in trade publications, local newspapers, and through business brokers. The businesses can often be purchased lock, stock, and barrel, including equipment, office supplies, and existing clients.

Of course, there are drawbacks to buying a business. Though the actual dollar amounts required depend on the size and type of business, it often takes more cash to buy an existing business than to start one yourself. When you buy a company's assets, you usually get stuck with at least some of its liabilities, as well. And it's highly unlikely that you'll find an existing business that is precisely the company you would have built on your own. Even so, you just might find the business you want is owned by someone else.

Why do people sell businesses—especially profitable ones? There are a variety of reasons. Many entrepreneurs are happiest during the startup and early growth stages of a company; once the business is running smoothly, they get bored and begin looking for something new. Other business owners may grow tired of the responsibility or be facing health or other personal issues that motivate them to sell their companies. They may just be ready to retire and want to turn their hard work into cash for their golden years. In fact, some of the most successful entrepreneurs go into business with a solid plan for how they're going to get out of the business when the time comes.



### Smart Tip

If you buy an existing business, include a non-compete clause in your sales contract. Your new business won't be worth much if the seller opens a competing operation down the street a few weeks after you take over the old company.

It's also possible that the business is for sale because it has problems—and while they may not stop you from buying it, you should know all the details before you make a decision. The following steps will help you:

- *Find out why the business is for sale.* Don't accept what the current owner says at face value; do some research to make an independent confirmation.
- *Examine the business's financial records for the previous three years and for the current year-to-date.* Compare tax records with the owner's claims of revenue and profits.
- *Spend a few days observing the operation.* For example, if you're looking at a home care or home health-care service, ride along with one or two aides. If you're considering an adult day-care, sit in at the facility for a few hours a day for several days.
- *Speak with current clients.* Are they satisfied with the service? Are they willing to give a new owner a chance? Ask for their input, both positive and negative, and ask what you can do to improve the operation. Remember, even though sales volume and cash flow may be a primary reason for buying an existing business, customers are under no obligation to stay with you when you take over.
- *Consider hiring someone skilled in business acquisitions to assist you in negotiating the sale price and terms of the deal.*
- *Remember that you can walk away from the deal at any point in the negotiation process before a contract is signed.*

## Starting Your Own Business

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It may be that your best path to business ownership is starting a senior services company yourself, and that's what this book is all about. Let's start by taking a look at what it's like to be in the business of serving seniors.

# Running Your Senior Care Service

**M**ost people start a particular type of business because they enjoy doing that kind of work, and the typical owner of a senior services business is no different. You may find it frustrating that a major portion of your time will be spent on tasks other than doing work for your clients. In fact, it



won't be unusual for you to have days that are extremely busy and you work very hard, but you don't have interactions with clients.

As a solo operator, expect to spend at least one-fourth of your time on general business management and administration, marketing, purchasing, and billing. The bigger your business and the more workers you have, the more time you'll spend managing them instead of doing the work yourself. By contrast, the smaller your operation, the more likely you'll be doing much of the actual work as well as running the company.

For example, the owner of a small senior concierge or relocation business will typically spend a substantial amount of time working closely with clients and coordinating services. Operating a home care (typically nonmedical services) or home health-care business will often mean limited client interaction, because usually the business owner is responsible for supervising a staff of qualified caregivers who are assigned to clients according to their needs.

No matter how small or large your company is, it's critical that you not neglect the administrative side. It won't do you much good if you do the work but never bother to issue invoices so you get paid. Poorly maintained records can get you into trouble with the IRS and other government agencies. Sloppy purchasing procedures can mean you run out of important supplies at critical times. And if you aren't marketing on a regular basis—even when you've got all the work you can handle—your business will eventually dry up.

Although you must pay attention to the business side of your company, you can still design an operation that lets you spend most of your time on tasks you enjoy.

### Smart Tip

On your appointment calendar, schedule a specific date and time each week to take care of essential administrative tasks, including paying bills, sending out invoices, and marketing. This is an important commitment; don't let anything short of a crisis keep you from it.

Tip...

## Startup Stories

While it is true that you learn things by doing them, another way to learn something new is by example. After all, there's no reason you should repeat the mistakes of others if they're willing to tell you about them first. Throughout the book, you'll hear from our featured entrepreneurs who have started their own senior service businesses. These folks have built successful careers and have invaluable insights to share with you.

Let's start with Dick Padgett, founder and owner of Five Star Concierge in San Diego. Padgett started his senior concierge service as a transportation and shopping business in 1998, after he realized how much his wife's grandmother needed someone

to drive her on errands and to doctor's appointments. Since then, customer demand drove him to expand his operation to include handyman services and personal errands.

Anya Clowers is a registered nurse, travel expert, and speaker who educates travelers about the practical and medical side of travel through her business, *Jet With Comfort*. "I have found that active seniors are the biggest fans of this topic," she says. Her seminars include one-hour Power Point presentations that teach senior adults how to travel self-sufficiently and "pack peace of mind" by educating them on travel insurance and medical evacuation, the importance of hydration while traveling, how to prevent blood clots, and traveling with diabetes.

After working in rehabilitation massage for six years in the Phoenix, Arizona, area, one of Candy Malburg's clients recommended her to an activity director for a local retirement community. After talking with other activity directors in the area, reading a lot of books, and doing online research, Malburg took additional courses in geriatric massage and began working with senior residents. It wasn't long before she expanded her business to include a total of five retirement communities and two assisted-living communities. Malburg says that working with seniors now makes up 75 to 85 percent of her business.

Karen Martin, owner and founder of *Life Moves, LLC*, in Hartford, Connecticut, started her moving management service approximately 15 years ago. A realtor friend knew of her nursing background and expertise in antiques and collectibles. She asked Martin for her assistance with an elderly couple who had health concerns and needed to liquidate about 70 percent of their possessions. Recognizing the need for these types of services, Martin launched her business to help seniors who were in transition because of a decline in health, the death of a partner or spouse, or a desire for a change in living arrangements. In 2004, Martin quadrupled her profits from the previous year, indicating how big a need there was for this type of service—especially with seniors.

As the moving management part of Martin's business began slowing down due the economic collapse of the real estate market in 2007–08, Martin added a new "Health Services" division to *Life Moves* by becoming a patient advocate for seniors. "I accompany my clients to their doctor appointments, explain the medical visits, and follow up with instructions to them and family members," she says. Because she is a Registered Nurse, she is able to dispense medication, provide post-operative care, and comfort measures as needed.

Judy Heft of Stamford, Connecticut, started her business in the mid '90s to assist seniors with paying their bills and other administrative tasks. "I love working with seniors," she says. "Sometimes they are reluctant to ask their children for help since they don't want them to think they are incapable of handling their own affairs. Other times they are just lonely and want someone to talk to and assist them with daily money management." Heft recognized more than a decade ago that the older population was growing significantly and knew there would be a huge need for her

services. She feels the most important thing an individual should know or do before starting a senior service business is that seniors want to be treated with respect and don't want to be told they are too old to do things.

A few years ago, Doug Iannelli simultaneously started two senior service businesses: Flying Companions and Appointment Companions. After a friend suffered from a bad stroke, he saw the need to provide disabled and older travelers with non-medical assistance, as well as accompany seniors to appointments. "My friend had no family in the area and she needed to make arrangements to fly from one state to another for special treatment, but couldn't go alone," Iannelli says. "She also needed help getting to and from doctor appointments around Atlanta." This caused Iannelli to start thinking about other individuals and families in similar situations who needed to get loved ones from one place to another. He knew with baby boomers starting to morph into senior citizens and an increasingly aging population, more and more people would be in need of assistance with appointments and traveling.

In contrast to the aforementioned homebased operations, Allen Hager started his nonmedical home-care business, Right at Home, in 1995 with 20 employees in Omaha, Nebraska. He had worked in the health-care industry for many years and kept seeing what he calls a "care gap." This gap consists of people who fall in between healthy and needing institutional health care; they require only a little assistance to remain independent and in their homes. Because of the demand for these types of services, his operation quickly evolved into a franchise system that now supports more than 2,500 employees.

Diane Ross was already operating a thriving business in Reno, Nevada, when she added adult day care to the mix 18 years ago. Her center, The Continuum, offered a rehabilitation program with physical, occupational, and speech therapy for all ages, a child-care and preschool program, and a home safety evaluation program. The rapid growth of the senior segment in Reno, Nevada, prompted Ross to expand her offerings to meet the needs of that market.

## Do You Have What It Takes?

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It takes a special type of person to work with seniors. "You have to be a people person and have very good judgment in dealing with people and the issues surrounding them," Hager says. "Whether you are working with clients, caregivers, family members, or with the professionals who are referring you the business, there is going to be very intense people contact." While many of your clients will be able-bodied and lucid, others will suffer from infirmities and varying degrees of dementia. In addition to strong management and entrepreneurial skills, if you plan to work directly with seniors, you need:

- *Honesty and integrity.* You may be trusted with access to your clients' homes and sometimes even to their bank accounts.
- *Patience.* Even the sweetest, best-natured client will have a bad day, and you need sufficient patience to work through it.
- *Versatility.* Often, providing services for seniors necessitates wearing more than one hat at a time. Be flexible and willing to shift gears at a moment's notice.
- *Interpersonal skills.* You need to enjoy being around seniors and not be bashful about making conversation. At the same time, you need to be a good listener. Many seniors like to reminisce about earlier times in their lives, and they have some truly interesting stories to tell.
- *Reliability and punctuality.* Your clients will appreciate being able to depend on you to pick them up on time or keep appointments as promised.



### Beware!

Accept the reality that accidents happen. If you are squeamish about pooppy pants and sloppy eaters, some senior services, such as adult day care or home care, may not be for you. Even with adequate and qualified staff on hand, there may be times when you will be required to take care of some of your clients' more intimate needs.

## Experience Is the Best Teacher

**O**ften, the best way to learn more about yourself and others is to become personally involved in the daily operations of a business similar to the one you want to start. Get a job working with a company providing the services you intend to offer. You'll gain important experience in the realities and logistics of the operation that will give you a solid foundation for your own business.

When doing your market research, take classes or join organizations and volunteer groups that are committed to elder care. Allen Hager, owner and founder of Omaha, Nebraska-based Right at Home, took this idea a step further by becoming a certified nursing assistant and working as an aide for about eight months. "I had always been on the desk side of health care, and I knew that I would never have another opportunity to do this," he says. After taking the 75-hour course, passing the test, and becoming certified, Hager worked 12-hour shifts on weekends at a local nursing home. This experience gave him insight into senior citizens and the issues that concern them.

- *Compassion.* You need to be able to demonstrate understanding and encouragement with seniors whose capacities are failing.
- *Knowledge.* You can be a tremendous asset to your elderly clients by having information about various services available to senior citizens, both locally and nationwide.

## The Daily Grind

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Your daily operations will vary substantially based on the senior services business you start. You must understand what you need to do in the way of administration and operations, and set up systems from the beginning that allow you to efficiently deal with the issues you'll encounter on a daily basis.

Keep in mind that you don't have to do everything yourself, even if you decide you want to be a one-person show. You can outsource some of your administrative functions, such as billing. You can hire someone to design your website. You can take advantage of convenience services offered by suppliers to make your purchasing and inventory management easier.

In the next chapter, we'll discuss creating a business plan that will get you started on the right foot.

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