



Break Down the Barriers to Growth & Balance

Streamline your processes and automate your workflow to create work-life balance and instrumental growth in your agency.

Your Goals + Agency Persona

EVOLVE OR REPEAT.

Goals can help provide complete clarity and direction for you AND your business. But only if you set smart goals and a clear plan to achieve them. It is vital to carve time out of your schedule to reflect on your year (both ahead of - and behind you), and decide where you want to take your business, what matters most to you, and how you're going to get there.

Take some time to dive deep into your goals and who you are as an agency vs where you want to be. Challenge yourself to move out of your comfort zone, and step into your vision of being the industry leader.

Your Goals

01	What are your top three goals that you would like to achieve in the next year?	(These can be agency and owner development related)
02	What is your agency's monthly revenue compared to your monthly revenue goals?	
03	What is one thing you can start doing tomorrow to help you achieve those goals?	
04	Ask yourself – What would life look like for you and your agency in 5 years if you reach those goals?	
05	What would it look like in 5 years if you stayed exactly where you were right now?	

Your Agency Persona

01

What kind of leader are you?

02

What are your agency's values?

03

What is your mission statement?

04

What makes you stand out among your competitors?

05

What do you do well vs. what needs to improve?

06

How many employees do you have?

07

What values do you look for in your employees?

08

What skills do you look for in your leadership team?

09

What are your company's values? If you asked your employees what your values are, could they tell you?

Agency Awareness

The definition of awareness is the knowledge or perception of a situation or a fact. Becoming Agency-Aware is about creating a strong sense of who you are as an agency and a leader in the industry so that you can have the CLARITY and CONFIDENCE to get the results you want in your life AND your business.

RANK YOUR AGENCY

Based on your current situation, take a moment to rank yourself and your agency on the categories below. Mark the outer ring if you feel you're amazing in that area and the center if you feel you need additional support or more work on those areas.

Owner Development:

Your commitment to setting clear expectations and boundaries – and sticking to them! You know and understand what it means to be an exceptional leader – how to communicate, navigate conflict, adapt, delegate, innovate, and create a highly engaged and empowered workforce.

Caregiver Management:

Your ability to know when your employees need a break, BEFORE it's too late. You have refined processes and policies to ensure that your employees are set up for success, have the resources they need to excel, and are held accountable.

Business Goal Development + Growth Potential:

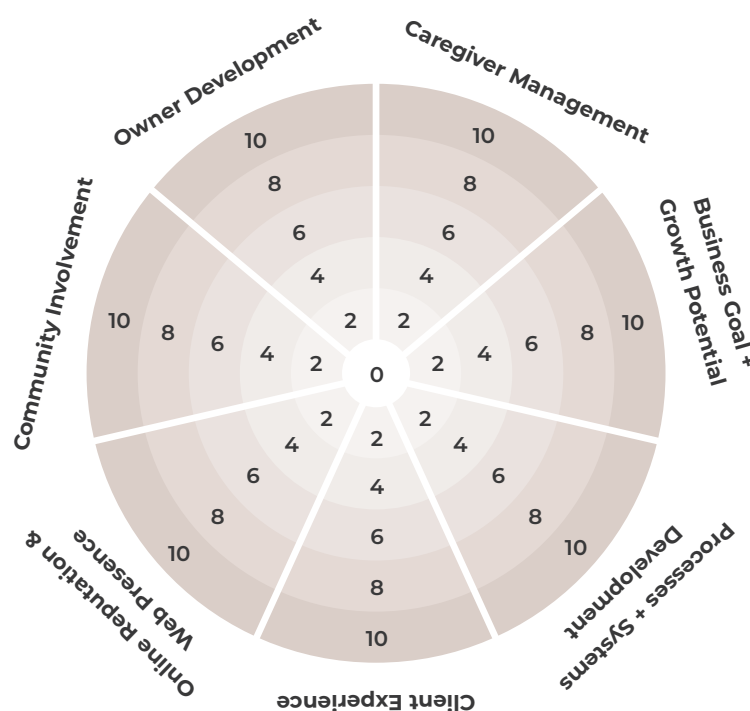
Your ability to know and understand your agency and position yourself as a leading expert. By understanding your strengths and weaknesses, you are able to determine your goals and action plan to help you save time and maximize your bottom line.

Processes + Systems Development:

You effectively manage your time, reduce redundancies, and maximize your bottom line. You've optimized your hiring processes to bring more exceptional candidates, minimize turnover, and prepare for future demands.

Client Experience:

Your clients are raving fans who sing your praise because you've provided them with top-notch boutique service. Your seamless communication



process allows them to stay in the know and trust your reliable service.

Online Reputation & Web Presence

Your ability to successfully and consistently share your brand, story, and quality service online. Your "home online" represents your brand, shares your message, and successfully attracts potential clients due to your outstanding online presence.

Community Involvement:

You generously give back to the community that you reside in. You understand the importance of maintaining relationships and giving back and you successfully do so. Because of your involvement you're top-of-mind when those in the community consider care.

A HEALTHY VERSION of *you* and your agency

BASED ON THE INSIGHTS YOU GLEANED ON THE PREVIOUS PAGE...

What are the top three things you learned about yourself and your agency?

01	
02	
03	

What are the three biggest areas of opportunity?

01	
02	
03	

* Star the one that surprised you the most.

As a leader, how are you showing up? How do you prioritize self-care?

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What do you love most about working in your agency? What do you like the least?

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Let's take a look at your day-to-day.

How much time do you currently spend on each of the items below. On a scale of 1-5, with 1 being the least amount of time and 5 being the most amount of time spent on each activity.

_____ Putting out fires	_____ Networking Events
_____ Scheduling	_____ Community Involvement
_____ Client Issues	_____ Continued Education, Seminars, Conferences
_____ Caregiver Issues	_____ Family
_____ New client Assessment	_____ Financials + Bookkeeping
_____ HR Issues	_____ Chasing Clients for Payment

What surprised you the most about this list and how you ranked yourself?

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What things do you spend too much time on that don't increase your bottom line.

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YOU ARE NOT ALONE.

At the end of the day, I want you to know that you are NOT alone. Not by a long shot.

While running a home care business can be a rewarding job because you know you are making a difference in the lives of families, it can also be super stressful handling ALL the things – caregiver call-offs, high-turnover, balancing the needs of your clients AND your caregivers, putting processes and systems in place to prevent burnout and poor communication, having zero work-life balance, and so much more.

I've been there. *In that exact same spot.*

I was on the verge of burnout, working seven days a week, nights, weekends, and holidays included. I had zero-work life balance. I didn't know when to 'shut down'. I didn't have boundaries or processes and systems in place to protect myself, my clients, and my employees.

Enough was enough. I knew something had to change or I wasn't going to succeed, and the business wasn't going to survive either.

So I set out on a mission. I took the knowledge I had from my marketing and corporate background, searched for all the training I could gather, and set out to create a goal-crushing, profit-pumping, boutique style agency where I could FINALLY have work-life balance, employees who cared about their job AND their clients, and clients who are genuinely happy!

And, better yet, I want to take everything I have learned about...

- ✓ Owner Development
- ✓ Caregiver Management
- ✓ Business Goal + Growth Potential
- ✓ Processes + Systems Development
- ✓ Client Experience
- ✓ Online Reputation & Web Presence
- ✓ Community Involvement

And share it ALL with you, so that you can build the business of your dreams, while having work-life balance that allows you to be present and joyful.

I am here for you. I am here to help you jump over the hurdles rather than plowing right through them. I want to help you scale your business with confidence, less stress, and much faster than you thought possible.

So, what do you say?

See you soon!

Xoxo - Becky

FAQ'S

I have a lot on my plate and don't want to add another thing, will this be worth it?

Absolutely. As long as you show up, put in the work, and practice the strategies I teach, I can promise you WILL be successful, and feel like you can finally breathe. You don't have to be stuck in the day-to-day, constantly putting out fires. With a bit of development, new processes and systems in place, and time management, you will be so happy you invested in yourself and your business.

I'm doing pretty well in most areas, but I could use help developing processes and systems. Do you offer different packages?

Yes, definitely! I have four different options to choose from. When you sign up for your FREE discovery call, we can go over which package would work best for you.

Are there payment plans available?

Yes, I want to make sure that you are set up for success so I've included a Pay in Full option and a Monthly Installment plan so that you can choose the best option for your business.

What if I don't live in your area? Do you still offer in-person and online support?

YES. No matter where you are in the US, pending the package you choose, I will spend time with you both in-person AND online. When you sign up to work with me, I make a promise that I am ALL IN to support you and your goals, focusing on confidence, decision making, communication, and so much more. You'll have my full support including access to my cell phone for emergencies and one-off questions.

Meet Becky Reel

FOUNDER + CONSULTANT



I am a home care consultant committed to helping business owners and executives find work-life balance by creating processes and structures to scale their business to the next level.

I took my home care business from **near bankruptcy to increasing revenue 300% year over year** by implementing process improvements, setting boundaries, and building the right team.

I will share my EXACT steps on setting boundaries and clear expectations that allowed me to take back control of my life and set the agency up for success.

My passion for high-quality Home Care comes from watching my 'Papa' go through a tragic end-of-life experience due to a lack of communication and neglect from his care in a nursing home. My family and I took that experience and created a thriving home care agency to make a positive difference in

the community and bring joy to all those we served.

After scaling For Papa's Sake Home Care to become the top rated agency in North America by Home Care Pulse year after year, I was able to successfully exit the business for more than market value.

It is my mission to help more agencies provide high-quality, personalized, and compassionate care for their clients while growing their businesses at a sustainable rate. I want to help them create a positive culture where each employee feels valued, with the opportunity for growth.

Outside of work, family is everything. My husband and I have two beautiful children, Hazel and Harrison, both named after my Papa. They keep us busy to say the least - *if you know you know!* Coffee is a necessity. I'm a Board Member of Family Forward and have the biggest soft spot for our family dogs, Arthur and Doug.

CREDENTIALS:

- ✓ Undergraduate degree from Columbia College in Chicago, focusing on media management and communications.
- ✓ Master's in Business Administration from Lake Forest College, focusing on organizational changes and international business.
- ✓ 15+ Years of Marketing and Operations Experience
- ✓ 10+ Years of experience as a Home Care Agency Executive Director/Owner

It's Your Time

If you want to grow as a business owner, you need to work on your business, rather than in your business."

-Unknown

You don't have to be stuck in the day-to-day, feeling like you're constantly suffocating.

Embrace the shift from reactive to proactive.

You *can* create processes and systems that work for you. You *can* set boundaries that allow you to have work-life balance AND move the needle forward in your business. You *can* have all of this AND a profitable business. *That's success.*

Are you ready to redefine success with one-on-one support?

Schedule a complimentary call to discuss your strengths, weaknesses, and goals and figure out the next right step for you and your agency.

SCHEDULE A DISCOVERY CALL —→



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