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Home Care Agency Launch Readiness Assessment

A 50-question self-assessment to determine if you are ready to launch your home care agency

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Are You Ready to Launch?

Many aspiring agency owners rush to submit their license application before they are truly ready. The excitement of starting a new business is understandable, but launching prematurely can lead to costly delays, compliance violations, and missed opportunities. An incomplete application may be returned by your state's regulatory body, pushing your timeline back by weeks or months. Worse, opening your doors without the right systems, insurance, or staff in place can expose you to liability and damage your reputation before you even serve your first client.

This 50-question self-assessment is designed to help you identify gaps in your preparation so you can address them before they become costly problems. Work through each category honestly, marking each item as complete or incomplete. Your total score will tell you whether you are ready to move forward, almost ready with a few items to address, or in need of more foundational work before launching. There are no wrong answers—only honest ones that will save you time and money.

How to Use This Assessment

Print this document or work through it on screen. For each question, mark "Yes" if you have fully completed that item, "No" if you have not started or not completed it, or "N/A" if it does not apply to your state or business model. Count your total "Yes" answers at the end to determine your readiness level.

Category 1: Legal and Business Formation

These foundational items must be in place before you can operate legally. Skipping any of these can result in personal liability, tax penalties, or application denial.

- Have you chosen and registered your business entity (LLC, S-Corp, C-Corp)?

- Have you obtained your EIN from the IRS?

- Have you designated a registered agent in your state?

- Have you opened a dedicated business bank account?

- Have you consulted with a healthcare attorney about compliance requirements?

Have you consulted with an accountant about tax structure and bookkeeping?

Have you obtained general liability insurance with adequate coverage limits?

Have you obtained professional liability (E&O) insurance?

Have you obtained workers compensation insurance (or verified if your state requires it)?

Have you registered with your state's Department of Revenue for tax purposes?

Category 1 Score: - - - - - / 10

Category 2: Licensing and Compliance

Licensing is the gateway to operating your agency. These items ensure your application is complete and your agency meets all regulatory standards from day one.

- Have you identified your state's specific licensing requirements for home care?

- Have you downloaded and reviewed the complete state license application?

- Have you identified the administrator qualifications required by your state?

- Do you (or your designated administrator) meet all state-required qualifications?

- Have you developed a comprehensive policies and procedures manual?

- Has your P&P manual been reviewed against your state's regulations?

- Have you completed all required background checks for owners and key personnel?

- Have you identified whether your state requires a surety bond?

- Have you researched whether your state has a Certificate of Need requirement?

- Have you set aside funds for all application fees and associated costs?

Category 2 Score: - - - - - / 10

Category 3: Staffing and HR

Your caregivers are the face of your agency. Having a solid staffing infrastructure ensures you can recruit, train, and retain quality employees from the start.

- Have you created job descriptions for all positions you plan to hire?

- Have you established a competitive pay rate based on your local market?

- Have you identified your initial staffing needs (number and type of caregivers)?

Do you have a recruitment strategy in place?

Have you created an employee handbook?

Have you developed an orientation and training program?

Have you created a competency evaluation process for caregivers?

Do you have a system for tracking employee credentials and certifications?

Have you established a supervision schedule and process?

Have you set up payroll processing (in-house or third-party)?

Category 3 Score: - - - - - / 10

Category 4: Operations and Technology

Operational systems are the backbone of your agency. Without the right technology and processes, you will struggle to manage scheduling, documentation, billing, and compliance.

- Have you secured office space that meets your state's requirements?

- Have you set up a business phone system with after-hours coverage?

- Have you selected and set up scheduling software?

- Have you selected and set up an electronic health record (EHR) or documentation system?

- Have you set up a secure system for storing client and employee records?

- Have you established a process for client intake and assessment?

- Have you created client service agreements and consent forms?

- Do you have reliable internet and IT infrastructure?

- Have you set up accounting and billing software?

- Have you established a quality assurance and incident reporting process?

Category 4 Score: - - - - - / 10

Category 5: Marketing and Client Acquisition

You can have the best agency in your market, but without a plan to attract clients and build referral relationships, your doors will stay quiet. These items ensure you are ready to generate business from day one.

- Have you defined your target market and service area?

- Have you created a professional website?

Have you set up a Google Business Profile?

Have you developed marketing materials (business cards, brochures, leave-behinds)?

Have you identified your top 5 referral sources (hospitals, physicians, discharge planners)?

Have you created a referral outreach plan?

Have you set up social media profiles for your agency?

Do you have a client acquisition cost estimate?

Have you planned your grand opening or launch announcement?

Do you have a 90-day marketing plan for your first 3 months?

Category 5 Score: - - - - - / 10

Scoring Guide

Add up your "Yes" answers from all five categories to determine your overall readiness level.

TOTAL "YES" ANSWERS	YOUR SCORE	READINESS LEVEL
—	<i>Write your total here</i>	

40– 50 **Ready to Launch**

You are well-prepared. Submit your application and move forward with confidence. Your foundational work is solid, and you have addressed the key areas that trip up most new agency owners. Focus on execution and be prepared for the survey process.

25– 39 **Almost Ready**

You have made significant progress but have some gaps to address. Focus on the items you answered "No" to before submitting your application. Pay particular attention to any gaps in the Legal and Licensing categories, as these are the most common reasons applications are returned or delayed.

0– 24 **Needs Work**

You have important foundational work to complete. This is not a setback—it means you caught these gaps before they became expensive problems. Prioritize the Legal, Licensing, and Operations categories first, as they form the foundation everything else is built on.

Personalized Next Steps

If You Scored "Ready to Launch" (40–50)

Congratulations—you have done the hard work of preparation. Here is your action plan:

1. **Submit your application.** Gather all required documents and submit your license application to your state's regulatory body. Double-check that every attachment is included and every field is completed.
2. **Begin caregiver recruitment.** Start interviewing and onboarding your initial team of caregivers so they are ready to work as soon as you receive your license. Run background checks and complete training before your first client.
3. **Activate your marketing plan.** Begin outreach to your top referral sources, launch your website, and start building relationships in your community. The time between application submission and license approval is ideal for relationship-building.
4. **Prepare for the survey.** If your state requires an on-site survey, make sure your office, documentation, and policies are survey-ready at all times.

If You Scored "Almost Ready" (25–39)

You are close, but submitting now could lead to delays. Here is how to close the gap:

1. **List your "No" answers.** Write down every item you answered "No" to. These are your action items.
2. **Prioritize by category.** Address Legal and Licensing gaps first, then Operations, then Staffing, then Marketing.
3. **Set deadlines.** Assign a completion date to each item. Most items can be resolved within 1–2 weeks with focused effort.
4. **Target a submission date.** Set a realistic date 30–60 days from now for submitting your application. Work backward from that date to schedule your remaining tasks.

If You Scored "Needs Work" (0–24)

There is no shame in being at the beginning. The fact that you are assessing your readiness puts you ahead of many aspiring owners who skip this step entirely. Here is your path forward:

1. **Consider working with a consultant.** A structured launch timeline with expert guidance can save you months of trial and error. A consultant can help you prioritize tasks, avoid common mistakes, and stay on track.
2. **Focus on one category per week.** Tackle Legal and Business Formation first, then move to Licensing and Compliance, followed by Operations. Do not try to do everything at once.
3. **Build your professional team.** Identify a healthcare attorney, accountant, and insurance broker who specialize in home care. These professionals will be invaluable throughout your launch process.
4. **Set a 90-day launch preparation timeline.** Most agencies can complete all 50 items within 60–90 days of focused effort. Map out your timeline and hold yourself accountable.

Remember

Every successful home care agency owner started exactly where you are right now. The difference between those who succeed and those who struggle is preparation. By completing this assessment, you have already taken an important step toward building a compliant, well-organized agency that serves your community with excellence.