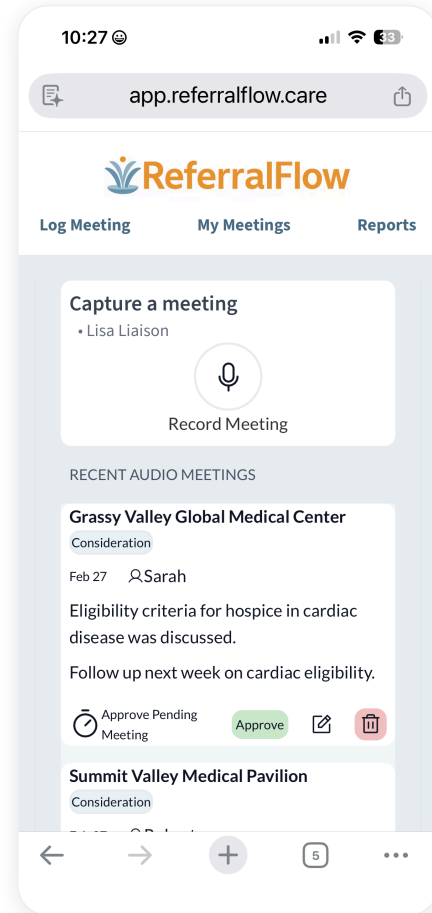


DECISION BRIEF · POST-ACUTE CARE CRM

Know what's working. Fix what isn't. Before census drops.

ReferralFlow gives hospice and home health leaders real-time visibility into liaison activity and account health.



THE PROBLEM

Most programs fly blind on business development.

Census problems rarely announce themselves. By the time referral volume drops, the relationship issues causing it are 30 to 60 days old. Standard CRMs weren't built for this workflow. Spreadsheets don't scale past two liaisons.

30–60

Day lag

Between relationship decline and visible census impact. You're always managing yesterday's problem.

0

Directional visibility

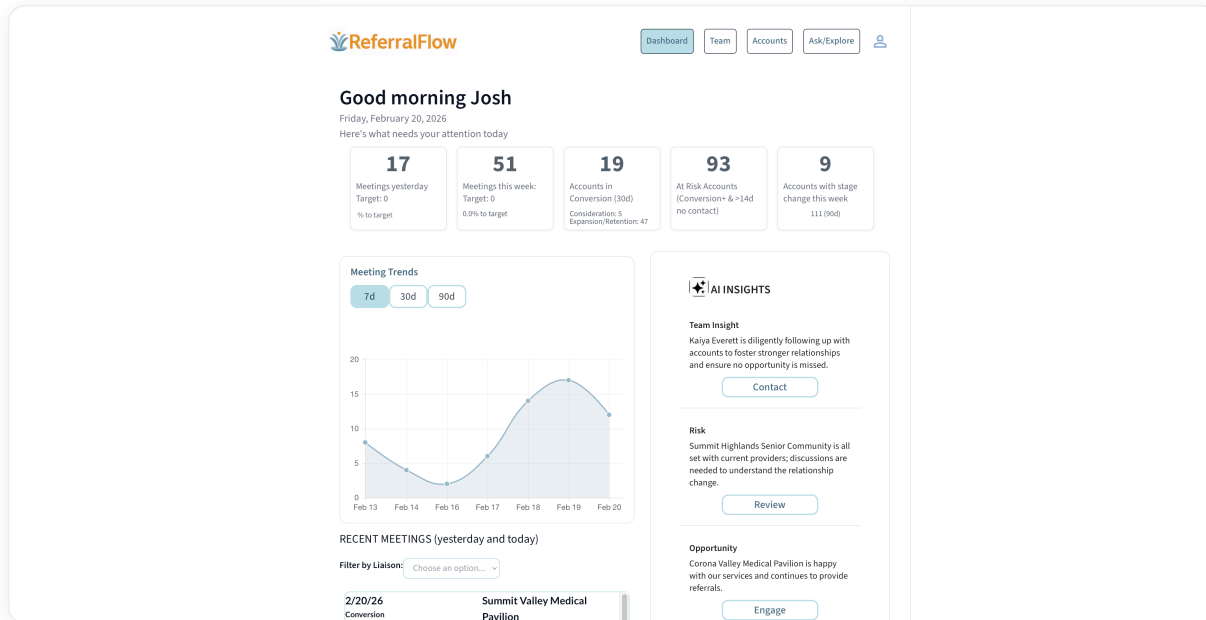
You know meetings happened. You don't know which accounts matter, or whether the right ones are being visited.

∞

Transition risk

When a liaison leaves, their relationship history walks out with them. No handoff. No institutional memory.

The core issue isn't effort—it's signal. Your liaisons are out in the field every day. The question is whether you can see what they're doing, which accounts are moving, and where to intervene before something goes sideways. ReferralFlow is built to provide that signal.



Manager dashboard — live activity, at-risk accounts, and AI-generated insights in a single view.

WHAT IT DOES

Five things that change how you operate.

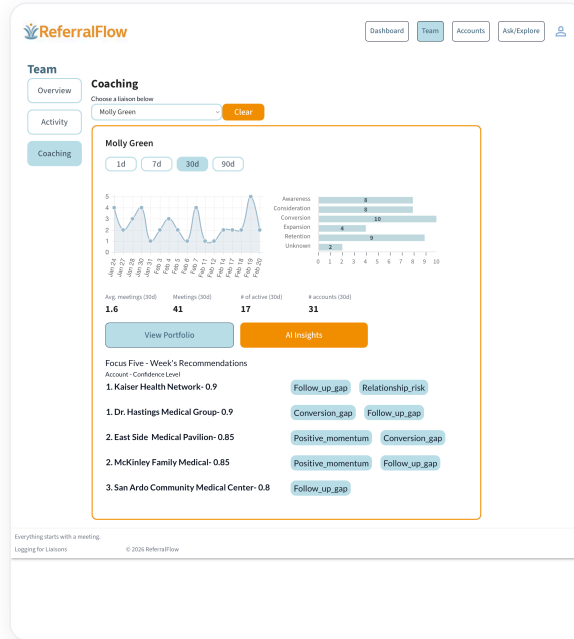
- 1 **Account-Level Activity Tracking**
Every visit logged records liaison, account, stage and more. See who is being visited, who is not, and how long since last contact.

- 2 **At-Risk Account Alerts**
Accounts at various stages without contact are automatically flagged for manager review. Configurable thresholds by stage.

- 3 **Liaison Coaching View**
Per-liaison performance metrics, portfolio health, and trend data. Run coaching sessions from actual numbers, not impressions.

- 4 **Voice-to-Log Note Entry**
Liaisons record notes by voice in the field or simple form. Structured analysis auto-generated for manager review.

- 5 **AI Insights on Accounts and Team**
Surfaces relationship changes and risk signals from activity patterns—not manual reporting.



Team coaching view — per-liaison activity trends, portfolio by stage, and AI insights.

No EMR integration required. Works alongside your existing clinical systems. Liaison data stays in ReferralFlow; clinical data stays in your EMR. No IT project to get started.

HOW IT COMPARES

**Built for hospice workflow.
Not adapted to it.**

	GENERIC CRM	REFERRALFLOW
Setup	Months, often needs admin	Live in minutes, self-serve
Account stages	Generic sales pipeline	Hospice-specific context and logic
Field note entry	Typed forms	Voice logging, mobile-first
At-risk alerts	Manual reports	Automatic, by stage and days since contact
AI insights	Limited or manual	Account- and liaison-level narrative
Coaching tools	Export to spreadsheet	Per-liaison dashboard, built in
Cost	Often \$300–\$500+/user + administration, customization, add-ons...	\$100–\$400/user/mo

PRICING

Simple. Per seat. No surprises.

FOR ENGAGEMENT

LIAISON

\$100 /mo

Full mobile access, voice logging, account tracking, and AI insights. Per active liaison.

FOR VISIBILITY

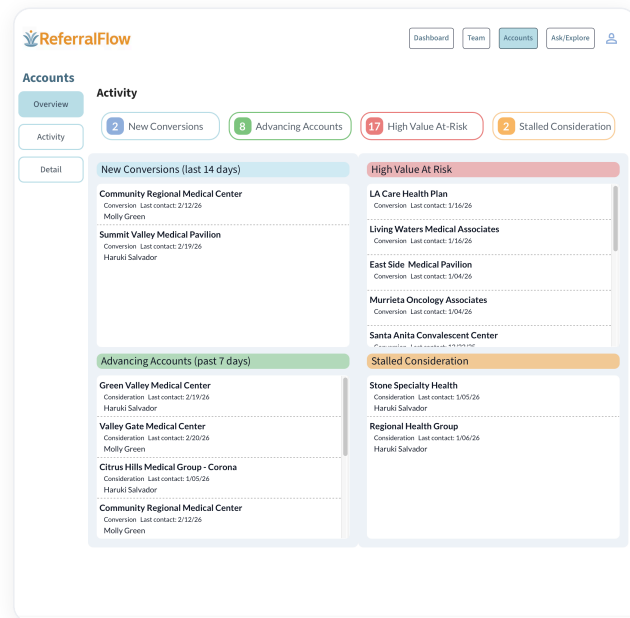
MANAGER

\$400 /mo

Team dashboard, coaching view, activity reporting, and AI insights across all liaisons.

Implementation Timeline

Follow a signup link, configure your liaison team, and you're operational. Live in Five...minutes. Seriously. No IT support needed.



Accounts activity view — new conversions, advancing accounts, at-risk, and stalled in one screen.

FOR YOUR PROGRAMS

Where this makes an immediate difference.

Multi-program organizations face a specific visibility gap: the person responsible for growth often has no direct line of sight into what's happening on the ground in each territory.

MULTI-PROGRAM OVERSIGHT

Gain visibility across programs.

See activity levels, account health, and at-risk flags across all your programs. No more waiting for weekly calls to find out what's happening.

LIAISON TRANSITIONS

Protect account relationships when staff turns over.

All relationship history stays in the system. When a liaison leaves, their accounts don't go dark—the next person picks up exactly where they left off.

COACHING & PERFORMANCE

Coach to the data, not the feeling.

Per-liaison dashboards show visit frequency, stage distribution, and trending accounts. Run 1:1s from the same screen both of you can see.

IN-SERVICE FOLLOW-THROUGH

Verify that in-service work drives actual engagement.

Log in-service visits as account touchpoints, then track whether those accounts actually advance in stage—closing the loop from education to referral.

Worth a brief conversation about a free trial?

We'll discuss scope, timeline, and success metrics. No sales theater.

hello@referralflow.care
referralflow.care