

A call script and intake form for new families, free to print.

What to ask, when to bring up rates, and how to end the call with the assessment on the calendar. Print it, keep it by the phone.

Neill Papa, Next Loop Co. · October 2026

The short version

1. Call back fast. If you can't talk yet, text that you'll call in 20 minutes.
2. Open with your name and one thing they wrote.
3. Ask where they are now, then stop talking.
4. Ask what a good week would look like.
5. Walk through your plan in three or four steps.
6. Give your rate plainly when they ask.
7. Ask if it would help, then offer two real times for the assessment.

The call that decides a lot

A daughter calls on a Tuesday afternoon. Her dad fell last week, he's home from the hospital, and she lives two hours away. She's got your website open in one tab and two other agencies in the others.

You're in the car between visits. You call her back. And the first thing out of your mouth decides a lot.

This is the script I'd want next to the phone for that call. It follows the same order the Next Loop app uses when it writes a call guide for each family: where they are, where they want to be, the plan in between, then the ask. Use it as it is, or change the words so they sound like you.

Before you dial: 30 seconds

- Read what they wrote again. Pick one detail you can say back to them: a name, something they mentioned, the town.
- Know your next opening for an assessment before you call, so you can offer a real time.
- If you can't talk yet, text first. A reply in minutes beats a perfect call tomorrow.

Say: “Hi Maria, it's [your name] from [your agency]. I read your note about your dad. Can I call you in 20 minutes?”

1. Open: who you are and what you read

Say: “Hi Maria, it's [your name] from [your agency]. You wrote to us about your dad. Is now still a good time?”

Say back the one detail. It tells her a person read it, not a call center.

2. Where they are now: let them talk

Ask, then stop talking.

Say: “Can you tell me a little about what's going on with your dad right now?”

Say: “What's been happening since he came home?”

Say: “What have you tried so far? Family helping, another agency, anything like that?”

Say: “What worries you most about him being on his own?”

Write down her words, not your summary. You'll use them in a minute.

3. Where they want to be

Say: “If this was sorted out, what would a good week look like for him? And for you?”

Most families answer with something specific: mornings covered, somebody there for showers, not getting a call at work that he's on the floor. That answer is the reason they'll say yes.

4. The plan in between

Three or four steps, in order, in your words. Only the steps you take every time.

Say: “Here's how we'd usually do it. I'd come out and meet you both at his place, and see the house and how he gets around.”

Say: “Then we'd put together a care plan around the times you need, mornings first.”

Say: “We'd match a caregiver to him, and you'd meet them before they start.”

Say: “And I'd check in after the first week to see what needs changing.”

Don't promise a start date, a specific caregiver or an outcome on this call. You haven't seen the house yet.

5. Rates: say them when they ask, plainly

If she asks what it costs, answer. Dodging the price is the fastest way to lose a private-pay family who's comparing three agencies.

Say: “Our hourly rate is \$__, with a __-hour minimum per visit. The assessment is free, and that's where we'd work out how many hours makes sense.”

If she doesn't ask, bring it up before you book the visit, so nothing surprises her at the house.

6. The ask

Say: “Does that sound like it would help?”

Then stop. Let her answer.

7. Book it before you hang up

Say: “Could I come by Thursday at 10, or is Friday morning better?”

Two real times beat “when works for you”. Confirm the address and who'll be there, then text the time right after the call.

After the call: 2 minutes

- Text the time and your name: “Thanks Maria. Thursday at 10 at your dad's. See you then, [your name].”
- Put the one thing she worries about most in your notes. Open the visit with it.
- If she said “let me think about it”, ask when you can check back, and put it on your calendar.

Printable home care inquiry and intake form

One page to fill in during the call. The questions run in the same order as the script.

THE CALL

Date and time they reached
out

Date and time you called
back

Caller's name and
relationship

Best number and time to
reach

Who needs care, age, town

How they found you

WHERE THEY ARE NOW

What's going on right now?

What's happened recently (a fall, a hospital stay, a diagnosis)?

What have they tried so far?

What worries them most? (their words)

WHERE THEY WANT TO BE

What would a good week look like?

Days and hours they're
thinking of

THE PLAN, RATES AND NEXT STEP

Plan walked through *Visit · care plan · caregiver match · first-week check-in*

Rate and minimum given

Assessment booked for

Who'll be there, address

If not booked: check back on

The script is the easy part.

The hard part is calling back while she still has your tab open, when you're out on a visit and the lead came in through your website form at 4:40 on a Friday.

That's what I built the Next Loop app for. The second a family reaches out, your phone lights up with who it is, how urgent it looks, and a call guide like this one, written around what they said. One less thing off your plate.

If you want to see how that would fit your agency, I do a 15-minute workflow review. No pitch deck. We look at how families reach you now and where they fall through.

Book a 15-minute workflow review at nextloopco.com/review, or call (650) 613-5455.