



CLIENT OVERVIEW

A national home health provider with a network of over 300 independently owned franchise locations across the United States. Each franchise operates with a lean administrative team responsible for managing an average of 150-200 clients and coordinating between 400-800 caregivers. Given the high volume of daily interactions between staff, caregivers, and patients, efficient and reliable communication is mission-critical to maintaining quality of care and operational performance.

THE CHALLENGES

- **Outdated Telephony Platform:** The existing phone system lacked modern capabilities and failed to support the organization's specific need for real-time, team-based texting—critical for caregiver scheduling and coordination.
- **High Communication Volume with Limited Staff:** Small administrative teams were overwhelmed managing communications across hundreds of clients and caregivers, leading to inefficiencies and potential service delays.
- **Lack of System Integration:** Communication tools were not integrated with the organization's CRM, creating silos and requiring manual data entry and follow-up.
- **Inconsistent Technology Across Franchises:** Independently owned locations lacked a standardized technology stack, resulting in uneven performance and support challenges.
- **Manual & Decentralized Onboarding:** HR and training processes were fragmented, slowing onboarding and limiting scalability.

THE SOLUTIONS

A fully integrated “franchise-in-a-box” technology solution was designed to standardize and modernize communications and operations across all locations:

AI-Powered Unified Communications Platform

Deployed a cloud-based phone system featuring:

- Team-based texting for real-time caregiver scheduling and coordination
- AI-generated call recaps to capture key details and reduce manual documentation
- Video conferencing with automated transcription for internal meetings and training
- Seamless CRM integration to ensure all communications are logged and actionable

Bundled Connectivity & Productivity Suite

Delivered a turnkey package including enterprise-grade internet services and Microsoft 365 licensing to ensure consistency and reliability across all franchises.

Centralized SharePoint HR & Training Hub

Designed and implemented a SharePoint-based platform to:

- Standardize onboarding processes
- Centralize training materials and documentation
- Streamline HR workflows across all locations

THE RESULTS

30% Reduction in Onboarding Time

Centralized HR and training resources significantly accelerated new hire ramp-up.

Improved Caregiver Coordination

Real-time team texting enabled faster scheduling decisions and reduced communication bottlenecks.

Increased Administrative Efficiency

AI-powered call summaries and transcriptions reduced manual work, allowing staff to focus on higher-value tasks.

Enhanced Data Visibility & Accuracy

CRM-integrated communications eliminated silos and improved tracking of client and caregiver interactions.

Scalable, Repeatable Franchise Model

The standardized “franchise-in-a-box” solution enabled rapid deployment and consistent performance across all 300 locations.

KEY TAKEAWAY

My Resource Partners transformed a fragmented technology environment into a standardized, resilient and scalable platform, enabling the client to grow confidently while maintaining control over cost and risk.