MY resource PARTNERS
TECHNOLOGY RESOURCES FOR BUSINESS

HOME CARE CLIENT STORY

MIAMI HOME CARE AGENCY

Giving a bilingual home care team full visibility into every call

This Miami agency's two offices ran on an outdated, router-based phone system, and most client and caregiver calls happen in Spanish. We connected an AI phone system that transcribes both languages into a new CRM, and upgraded to fiber for less than broadband.



THE RESULT

Every call

recorded, transcribed and logged in the CRM

90%
Of client care and caregiver calls are in Spanish

2 offices
One real-time view of how the whole team is performing

Fiber
For less than the old broadband circuit cost

THEIR STORY

In home care, the details that matter live in phone calls. This owner wanted to see all of them, in every language.

Our client is a Miami home care agency with two offices that decided it was time to modernize its communications and marketing. The owner reported that 90% of client care and caregiver calls were in Spanish, while the administrative team worked largely in English with referral partners, networking contacts and vendors. The business had also outgrown the way it tracked leads.

The challenges

- **An outdated phone system.** The old system still ran on a router, with no desktop or mobile app for the team.
- **Two languages, one business.** Client care and caregiver calls were mostly in Spanish; conversations with referral contacts and vendors were mostly in English.
- **No visibility across two offices.** The owner wanted to see every conversation and how her team was performing, but had no way to review calls across both languages and locations.
- **Leads tracked in spreadsheets.** The business had grown too much for spreadsheets to be a manageable way to track leads.
- **No leadership analytics.** Leaders had no reporting on calls and leads to guide decisions.

AT A GLANCE

INDUSTRY
Home care (senior care)

FOOTPRINT
2 offices in Miami, Florida; a bilingual Spanish- and English-speaking team

SERVICES
AI-Powered Phone System · Sales CRM · Fiber Internet

YOUR MRP ADVISOR



Scott Meyer
CEO, My Resource Partners

"In a diverse city like Miami, having a communications platform that can detect, transcribe and produce AI call recaps in different languages is a powerful tool for multilingual business owners. Integrating that with your sales CRM gives leadership powerful insights on what their clients want and how their team is performing."

- **Paying more for slower internet.** The office paid more for a broadband circuit than a fiber circuit would cost.

WHAT WE DID

The solutions

Our advisors built a plan around how this team actually communicates, in both languages.

AI-powered phone system

Replaced the router-based system with a cloud phone system that has desktop and mobile apps and multilingual call transcription, so the owner sees every call, in Spanish and in English.

The right CRM, at wholesale pricing

Her new marketing director had already suggested a sales CRM, and it was a fantastic choice. We backed it and negotiated wholesale pricing.

A CRM developer who knows senior care

We connected the agency with a developer who specializes in customizing CRMs for the senior care industry.

Native phone-to-CRM integration

The new phone system integrates natively with the CRM, so every call recording and transcription is logged automatically.

Fiber internet for less

We procured a fiber internet circuit for less than the agency was paying for broadband.

THE RESULTS

What changed

- **Full visibility, at all times.** The owner can see how her team is performing across both offices, and review client, caregiver and partner calls in Spanish or English.
- **A modern phone system.** The team now has desktop and mobile apps instead of a router-based system.
- **No more spreadsheets.** Leads now live in a CRM customized for senior care.
- **Automatic call logging.** Recordings and transcriptions land in the CRM with no manual data entry.
- **New analytics for leadership.** Leaders have access to powerful analytics they never had before.
- **Faster internet, lower cost.** Fiber replaced broadband, for less than the old monthly cost.

> KEY TAKEAWAY
>
> We listened first: we backed the marketing director's CRM choice, secured it at wholesale pricing, and connected it to a bilingual AI phone system. Now the owner sees how her team is performing at all times, with every conversation and every lead in one place.

Do you know what's said on every call?

Let's give your team visibility into every conversation, in every language, and connect it all to your CRM.

SCHEDULE A CONSULTATION

myresourcepartners.com · 561.614.1500 · Results are the proof. Relationships are the reason.