

WhizTurn Client-onboarding

Description

WHIZTURN CLIENT ONBOARDING

Help us understand your agency before we get to work.

This takes about 5 minutes. We only ask for information that helps us build the right growth plan, avoid assumptions, and move faster once your project begins.

Private onboarding
Saves back-and-forth
Built for home care agencies
Step 1 of 4
25%

01 YOUR AGENCY

Start with the essentials.

Basic information so we understand who you serve and where you operate.

Your name *

Work email *

Agency name *

Website

Country *

Primary city / service area *

Active clients *

Active caregivers *

What are we helping you with? *

☐

Private-Pay Growth More qualified family inquiries and starts of care

☐

Caregiver Recruitment Stronger applicant flow and hiring capacity

☐

Both Client growth and caregiver capacity together

default watermark

02 Â· CURRENT PICTURE

Tell us what is happening today.

Weâ??ll only show questions relevant to your engagement.

Which services do you most want to grow? *

- ☐ Companion Care
- ☐ Personal Care
- ☐ Dementia Care
- ☐ Respite Care
- ☐ Post-Hospital Care
- ☐ Overnight / 24-Hour
- ☐ Other

Average hourly billing rate

\$

Average care hours per client / week

hrs

Approx. new inquiries per month

Approx. starts of care per month

Where do most new clients currently come from?

- ☐ Referrals
- ☐ Google / Maps
- ☐ Google Ads
- ☐ SEO
- ☐ Meta
- ☐ Community / Professional Referrals
- ☐ Word of Mouth

Typical response time to a new inquiry

How many additional clients could you accept now?

How many caregiver positions are you trying to fill?

Approx. caregiver applicants per month

Approx. caregiver interviews per month

Approx. caregiver hires per month

Biggest caregiver recruitment challenges

- ☐ Not enough applicants
- ☐ Poor quality applicants
- ☐ Interview no-shows
- ☐ Slow hiring process
- ☐ High turnover
- ☐ Hard-to-fill shifts / areas

Where are you currently recruiting?

- ☐ Indeed
- ☐ Facebook / Meta
- ☐ Job Boards
- ☐ Employee Referrals
- ☐ Community Partnerships
- ☐ Word of Mouth

03 Â· MARKETING & SYSTEMS

What is already in place?

We want to build around what works, not replace things unnecessarily.

Which systems or marketing channels are currently active?

- ☐ Google Business Profile
- ☐ Google Ads
- ☐ Meta Ads
- ☐ SEO
- ☐ Email Marketing
- ☐ CRM
- ☐ Call Tracking
- ☐ Social Media

Approx. monthly marketing / recruitment spend

Who currently handles new inquiries / applicants?

What have you tried before that did not work well?

What access can your team provide if needed?

- ☐ Website
- ☐ Google Business Profile
- ☐ Google Ads
- ☐ GA4 / Analytics
- ☐ Search Console
- ☐ Meta Business Manager
- ☐ CRM
- ☐ Social Profiles

04 • GOALS

Tell us what success should look like.

This is the part we use to shape priorities for the first 30-90 days.

What is the single biggest growth problem you want us to solve first? *

Your main 90-day goal *

Your 6-month goal

Anything important we should know before we begin?

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Thatâ??s enough to get us started.

Weâ??ll review this internally and use it to prepare your first strategy and implementation priorities.

Continue â??

Please do not enter account passwords, medical records, client health information, or other sensitive data here.

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ONBOARDING RECEIVED

Thank you. We have what we need to begin.

Your information has been submitted to WhizTurn. Weâ??ll review it before the next strategy or onboarding call.

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Author

info-brandivsgmail-com