

CarePatrol

with PrimePay since 2020



HEALTHCARE



MAIN LOCATION
GILBERT, ARIZONA



FRANCHISE



PRIMEPAY
PROFITKEEPER

Making the Golden Years Great

Senior care advisory company streamlines financial management across 175 locations, reducing manual processes and saving hundreds of hours with PrimePay ProfitKeeper.

“It’s so difficult to make a good decision on elder care when you’re in crisis and you have to learn how to navigate an entire system quickly,” says CarePatrol’s Co-Founder and Brand President Becky Bongiovanni. “Unfortunately, people often try to find the right care by themselves first, get into trouble, and then say ‘Gosh, I wish I would have known about CarePatrol earlier.’”

Providing families vital support when it matters most

Many families don’t know what to expect as their loved ones age, and unintentionally choose a care facility that isn’t equipped to support their loved ones for the rest of their life. That’s why, for over three decades, senior care advisory company,

Initial Challenges

- Lack of visibility into the overarching financial picture across 175 franchise locations
- Inconsistent, manual reporting methods for franchise financial data delivered to corporate
- Excessive time spent on nights and weekends manually managing financial management, reporting, and forecasting processes
- Limited transparency into franchise performance and opportunities for improvement
- Inability to deep dive into data monthly or quarterly

Solution

- CarePatrol adopted PrimePay ProfitKeeper in 2020 to streamline data management tasks like gathering, mining, and aggregating across franchises to better visualize financial performance and enable franchisees to manage their businesses.

Benefits

- Saves company and franchise leaders time on manually mining and aggregating data to create financial reports
- Provides visibility into financials for both individual franchise locations and company-wide
- Enables franchisee self-service capabilities to help them manage their businesses effectively and see the bigger picture of their performance compared to other franchises
- Strengthens franchisee relationships by allowing franchise leaders to understand their data

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// “Franchisees wanted transparency,” Bongiovanni shares. “They felt like they were on an island and they wanted to see the bigger picture.”

CarePatrol, has helped families find the right local hospitals, nursing homes, care communities, and doctor offices for their aging loved ones.

Since 2009, CarePatrol has expanded to 175 franchise locations across the United States, but the company faced challenges with tracking financial performance across its extensive franchise network. Bongiovanni needed a comprehensive financial solution that would provide regular, accurate financial overviews of the company and individual franchises — without burdening her teams.

Too many spreadsheets, not enough time

Managing financial data for 175 locations is no walk in the park, and not having a standardized automated solution impacted the company at both the franchisee and corporate levels.

The franchise support team had to gather, normalize, mine, and aggregate data from every franchise to gain visibility into the full financial picture. This was an extremely labor-intensive undertaking that often led to unintentional errors or lost data, resulting in an unreliable financial overview.

There was only enough time to perform financial analysis and forecasting annually, which meant franchisees gained limited information on how they could improve performance or drive revenue throughout the year. Not only did this hinder successful business strategizing, but our locations couldn't monitor their performance compared to other locations.

CarePatrol needed a better way to simplify financial management and support their franchisees with deeper insights into their performance. The leadership team was eager to save everyone time and effort reporting on financial data, so they needed a tool that unified all the franchise accounts into one easy-to-use financial management solution.

Franchise-wide financial consistency at last

Bongiovanni explored multiple solutions to solve her financial headaches, but the companies she initially considered focused more on selling their solutions than on understanding CarePatrol's specific needs. One of Bongiovanni's former colleagues, an operations director for a major franchise headquarters, recommended PrimePay ProfitKeeper because it offered their organization the same capabilities and exceptional support Bongiovanni was seeking.

“The value ProfitKeeper provided for the cost was just right,” says Bongiovanni. “We put together a plan with the ProfitKeeper team and implemented it within 90 days. The transition was amazing because the ProfitKeeper team offered great support throughout the process, helping us make necessary changes as we evolved and found what was right for our business.”

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“ProfitKeeper effortlessly linked up with our existing tools, offering a simple process for our support team to work seamlessly with franchisees.” Bongiovanni explains.

PrimePay ProfitKeeper made it easy for the CarePatrol franchisees to integrate their existing data in Quickbooks Online, set up each location’s accounts, and standardize how franchisees collect their data. Plus, franchisees gained new visibility into their data, allowing them to garner insights from analytics and drive performance.

With all the franchise data in one place, the CarePatrol support team could visualize data to understand performance against KPIs. It was easy to generate robust reports, comparatives, individual profit and loss statements, and monthly forecasting reports in a flash.

These capabilities allow CarePatrol to not only see their own financial performance and business health at a glance but to also analyze performance more regularly and use those insights to better support their franchise partners.

“Seeing all of our accounts in a unified chart that we and our franchisees can reference is a game-changer,” Bongiovanni explains. “Now we can see how franchisees are doing and assess the health of their businesses every month. It’s no longer a mystery.”

By dedicating less time and effort to rectifying financial data and creating reports, the CarePatrol support team can focus on scaling their business and empowering their franchisees to focus on helping seniors and their families — not on paperwork.

“ProfitKeeper is a great plug-and-play tool that’s simple to use, especially for franchisors who don’t have the time or experience managing financial tools,” Bongiovanni says. “It delivers excellent service and eliminates the need for a dedicated financial manager, allowing the support team to devote more time and resources to building our franchise network.”

Focusing more on families and less on financials

PrimePay ProfitKeeper has given CarePatrol’s franchise network the capabilities they need to seamlessly and successfully run their businesses, saving them time on gathering data and creating spreadsheets to report data to the CarePatrol corporate team every month.

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// “We have a lot of competitive people who want to see how other franchisees are doing,” Bongiovanni shares. “ProfitKeeper allows our franchisees to see their net profits compared to other franchise locations and improve their performance.”

“Now that we can generate reports in a flash, we finally have the time and capabilities to deep dive into performance monthly and work with our franchisees to glean insights from that data,” shares Bongiovanni. “At a glance, we can see how franchisees are doing and assess the health of their businesses. It’s no longer a mystery.”

With deeper visibility into comparative performance across the franchise network, CarePatrol can celebrate the impact their franchisees make within their communities and recognize exceptional performance. This fosters a spirit of transparency and healthy competition that many franchisees have been waiting for.

At CarePatrol, higher revenue directly translates to higher impact because that means franchisees have successfully matched more local seniors with the right doctors or care facilities. “Our culture is really important because it all relates to the customer experience,” Bongiovanni shares. With easier financial management and data-driven insights through PrimePay ProfitKeeper, franchisees have the information and the time they need to offer the best support possible for their customers.

With a streamlined franchise financial management system in place, Bongiovanni can shift her attention to working with new franchisees and expanding CarePatrol to new communities. That means even more families can benefit from Bongiovanni’s experience and gain access to the valuable resources CarePatrol provides, allowing seniors across the country to enjoy their golden years to the fullest.

Tired of spending nights and weekends managing your financial data? [Contact us today](#) and see how PrimePay ProfitKeeper can transform your franchise management.

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