

**A Note from Lisa Moody:**

For the last 35 years, I have worked with small businesses, in various ways to help them find and build success. When I founded JewelCode Corporation in 2001, the world was in a time of flux. I was facing changes in my own business partnerships. These outside factors, coupled with the events of 9/11, put my world in a time of flux. A beautiful thing grew out of it when I happened to meet a couple who wanted to start a care management practice. They were also in a time of flux. Thus, my introduction to the benefits care managers bring to the world.

To start JewelCode, I needed to find funding and I knew that I didn't want to bring in investors who would force me to grow the business at their desired rate and dictate pricing and other considerations. I needed a way to bring in capital to start the business. I turned to my skill set of business management consulting and digital marketing, which at the time consisted of consultations with local small businesses to discuss how to grow their business and how to communicate that message to the world via a website. The foundation of JewelCode Corporation, the software company, is creating business growth and websites for other businesses.

Throughout the years, I would meet care managers who would mention their business consultation needs and their needs for websites or other digital marketing and we would take on small side jobs to help with further capital for our business and for growth of care management practices. We did this on a small scale as the software was our focus.

What happened was that word started to spread that we were doing this work with some care management practices and the demand increased. We increased our work and added staff to help with the growing work we were doing. In 2017, we officially started the business plan for The Agency by JewelCode and started our branding work and growing the agency.

In March 2020, Seattle was suddenly facing a time of flux as the new coronavirus suddenly hit King County, which is the county JewelCode is located in. We went on lockdown on March 4<sup>th</sup>. We had planned a grand announcement for the week of March 9<sup>th</sup> when we were going to share the full launch of The Agency by JewelCode, a subsidiary of JewelCode Corporation. We had been working very hard to create our launch and were very excited. As we went into lockdown and started talking about what was happening, we initially felt it was not the right time to market any of our services. We were sad and feeling a bit isolated and unsure about where the future would go. We knew that care managers were not able to visit their clients and this reduction in hourly billing may affect our clients and thus our business. We went negative for a second, which we think everyone did. Then, our phone started ringing. First, it was a care manager starting a brand new practice and this was the right time to create her website and other digital marketing tools. Then,

another client called and said she wanted to create an action plan to manage the COVID marketing and another called and another and we started to realize that care managers needed our help, right now.

And, I had a tool to help them. I pull out my old business management/planning tools and knew that I could adjust my business planning worksheets to help client plan their changes. A visual representation of how they needed to shift. This tool from The Agency by JewelCode is called P.I.V.O.T.

- **P is for Priorities** where you **list the priorities for your business right now.**
- **I is for Inventory** where you **list all services you have been offering in the 12 months prior to the need to pivot.**
- **V is for Value** where you **list what immediate value can you bring to your clients and their families.**
- **O is for Offerings** where you **list new services that meet the new needs and bring value to clients and their families.**
- **T is for Timeline** where you **review the offerings to note how soon they can be implemented.**

Right now, we are in a time of flux, and, as business owners, we need to pivot. We need to figure out how to help our clients in the best way possible and how to keep our businesses in operation. We offer the tool for you to use as you need to. We have provided it as one page per letter, with a sample at the back to help start you on the path. We use this with many of our clients in our consultations but didn't have a worksheet to share. We hope you enjoy the worksheet. If you want help completing the worksheet or want to discuss how to take your business forward on your timeline, including how to update your website, blogs, social media, and print brochures, etc., please feel free to reach out to me directly via the contact information at the top of the page.

**We can do this, don't be afraid of flux, it brings out new opportunities and a new path! Wishing you the best health and opportunities to serve your clients now, and in the future!**

My best, Lisa

**P.S. If you would like to schedule an appointment to discuss your business plan or you want to start using our marketing services, please schedule via the [www.jewelcodeagency.com/pivot](http://www.jewelcodeagency.com/pivot) link on our website.**

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<p style="text-align: center;"><b>V</b></p> <p style="text-align: center;">Is for Value</p>	<p>What immediate value can you bring to your clients and their families.</p>
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<p style="text-align: center;"><b>T</b></p> <p style="text-align: center;">Is for Timeline</p>	<p>This is a review of offerings and how soon they can be implemented. List each offering and estimate the timeframe to accomplish, then create a timeline with steps to make these things happen.</p>
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**Notes About Plans to Carry Out Timeline**

<b>Business Tools, Resources, Software</b>	
<b>Marketing, Website, Blog, Social Media, Newsletters</b>	
<b>Financials, Loans, Billing, New or Changed Fees</b>	
<b>Client Types, Services for Families, Clients, Businesses, Hospitals</b>	
<b>Efficiency, Process Creation or Changes</b>	
<b>Documentation &amp; Planning</b>	



**Sample Worksheet for The Agency by JewelCode's P.I.V.O.T. Business Plan**

<p style="text-align: center;"><b>P</b></p> <p style="text-align: center;">Is for Priorities</p>	<p><b>List the priorities for your business right now.</b></p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• Make enough money to pay the bills.</li> <li>• Make enough money for payroll.</li> <li>• Serve existing clients' needs.</li> <li>• Increase client base.</li> </ul>
<p style="text-align: center;"><b>I</b></p> <p style="text-align: center;">Is for Inventory</p>	<p><b>List all services you have been offering in the 12 months prior to the need to pivot.</b></p> <ul style="list-style-type: none"> <li>• Take clients to medical appointments.</li> <li>• Visit clients in their homes.</li> <li>• Visit clients in assisted living.</li> <li>• Help transfer clients from hospital to home or rehab.</li> <li>• Assess client's daily life/watch for changes.</li> <li>• Check home safety.</li> <li>• Manage medications.</li> </ul> <p>Your list will be much longer...</p>
<p style="text-align: center;"><b>V</b></p> <p style="text-align: center;">Is for Value</p>	<p><b>What immediate value can you bring to your clients and their families.</b></p> <ul style="list-style-type: none"> <li>• Communication (call clients, call facilities, call families, call providers, call insurance, share information, answer questions, most importantly, listen)</li> <li>• Medical management (assist with admissions/discharges, physician's appointments)</li> <li>• Technology assistance (iPads, GrandPads, find ways for clients to communicate with care manager, with family, make connections)</li> <li>• Social assistance (help connect clients to each other or others to help with social isolation and avoiding depression)</li> <li>• Enrichment (crafts, meals, artwork, music, find ways to enrich lives of those who are feeling isolated)</li> <li>• Increased family support (families at a distance are worried, help them find local support for their worries, encourage their involvement in enrichment activities)</li> </ul>

<p style="text-align: center;"><b>O</b></p> <p style="text-align: center;">Is for Offerings</p>	<p><b>List new services that meet the new needs and bring value to clients and their families.</b></p> <ul style="list-style-type: none"> <li>• Documents (make sure that all medical directives and other associated documents are current, and a copy is stored in care manager’s files)</li> <li>• Enrichment (create videos, share videos, send packages of supplies for crafts, create playlists and help with Spotify setup to share the playlists, lookup the schedule for Turner Classic Movies to suggest movies that you know your clients will enjoy)</li> <li>• Errands (grocery shopping services or have an employee shop and drop off supplies, groceries, takeout treats)</li> <li>• Daily Check-In Call (where possible call each client each day to see how they are doing)</li> <li>• Medication management (pick up prescriptions, ask client to leave old bottles outside when on the way, make sure that the correct number of meds are in the bottles, so we know they are taking their medications, research interactions and make sure that all meds are good together)</li> <li>• Provide PPE (find masks, hand sanitizer, and gloves for clients, make sure they understand hand washing)</li> <li>• Home Safety (have client’s lawns mowed, check porches/steps for debris or unsafe rugs, review roof and outside of house for obvious concerns post-winter)</li> <li>• Flowers &amp; plants (pick up hanging baskets or other flowers to provide color for clients’ views)</li> </ul>
<p style="text-align: center;"><b>T</b></p> <p style="text-align: center;">Is for Timeline</p>	<p><b>This is a review of offerings and how soon they can be implemented. List each offering and estimate the timeframe to accomplish, then create a timeline with steps to make these things happen.</b></p> <ul style="list-style-type: none"> <li>• Documents – immediately request, all updated within one month</li> <li>• Enrichment – immediate to 3 months</li> <li>• Errands – immediate</li> <li>• Daily Check-In Call – immediate</li> <li>• Medication management – immediate to one month</li> <li>• Provide PPE – one month</li> <li>• Home Safety – immediate to 3 months</li> <li>• Flowers &amp; plants – immediate to 3 months</li> </ul>