

# Carepreneur Academy

Helping you become everyone's favourite self employed carer!

## WORKBOOK

**Carepreneur Academy**



brought to you by



**PROFESSIONAL  
CARERS  
NETWORK**

Championing Self Employed Carers

[WWW.PROFESSIONALCARERSNETWORK.CO.UK](http://WWW.PROFESSIONALCARERSNETWORK.CO.UK)



STEP  
**01**

## Understand The Business Model

To Do

- ☐ Watch the videos in step 1

The type of care I do is:

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## STEP 02 Get Clear On The Details

Taking some time now to think about the little details about your business will REALLY help your business to flourish. Not only will it save you time, worry, stress and money, but it will give you the confidence to really go out and promote your new business as you are fully prepped and planned.

Failing to plan is planning to fail after all! So go through this next section, and watch the training videos, so that you can figure out exactly how your business will run.

You've got this!

# Get Clear On The Details

Places 15 mins away from me

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Location I serve

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Services I Provide

1. 

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2. 

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3. 

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4. 

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5. 

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6. 

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7. 

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8. 

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9. 

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10. 

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My USP's

1. 

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2. 

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3. 

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4. 

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5. 

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Services I Don't Provide

1. 

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2. 

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3. 

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4. 

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5. 

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6. 

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7. 

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# Get Clear On The Details

## Other Care Companies Prices

1. 30 mins  
1 hour  
evenings  
weekends  
bank holidays  
nights
2. 30 mins  
1 hour  
evenings  
weekends  
bank holidays  
nights

My day/s off are:

To Do

- ☐ T&Cs Note
- ☐ Contract

## Your Pricing:

30 mins  
1 hour  
3 hours plus

Notes:

## Business Buddy Possibilities?

My contingency care plan is:



# Your Financial Needs

3 parts to this:

*1: Work out your non-negotiable monthly costs: the minimum figure you need to bring in*

*2: Become financially aware and take control of your spending so you can cut your expenses down*

*3: Work out your daily earning goal*

It's a really good idea to take a minute and work out how much money you actually need to live!

## Non-Negotiable Monthly Bills That Must Be Paid

Task:

- Go through your monthly expenses and write down everything that you need to pay each month.
- Write down any yearly expenses you need to pay (divide this by 12 to find a monthly amount)
- Add everything up and work out the monthly figure to cover your bills.

Use the sheet on the next page to help you work out your non-negotiable costs you have each month.

Outgoing	£ (monthly)	Outgoing	£
Car Insurance	£	Pet Insurance	£
Car tax	£	Pet Food	£
Fuel	£	Vet Visits estimate	£
Garage visits estimate	£	Activities/lessons	£
House insurance	£	Mobile phone	£
Rent/mortgage	£	Beauty	£
Electricity	£	Exercise	£
Gas	£	Hobbies	£
Landline	£	Food Shopping	£
Internet	£	Clothes	£
TV license	£	Leisure Time	£
TV suscriptions	£	Holidays	£
Council Tax	£	Suscriptions	£
Water	£	Presents	£
Child Care Costs	£	Debt To be Paid	£
Clothes	£	Credit Cards	£
Shoes	£	Other	£
Activities	£		£
Lessons	£		£
School Meals	£		£
School Trips	£		
Child Maintenance	£		
Other	£		
		Total non negotiable bills:	£

# What else do I spend my money on?

Is there anywhere you can make savings? The less you spend the less you have to earn!

## Take Control of Your Spending

Second Task:

- Print out 3 months worth of bank statements
- Highlight all your monthly bills that are non negotiable eg. gas
- In a different colours highlight hobbies, eating out, food shopping, impulse buys, car fuel, clothes, activities.
- For each month add up what you spend on each category.
- Is there anything that stands out for you? Is there somethings you spend a lot of money on? Like a morning coffee at Starbucks (£3x20 days= £60 a month on one morning coffee! That's £720 a year! )

Having a better idea of what you spend your money on can really help to bring your monthly costs down. Which can just take the pressure off when starting up your new business.

My Old Money Habits That Were Not  
Serving Me!

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My New Money Habits Now That I Am  
Financially Aware!

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# My Daily Earning Goal:

Work out what your daily earning goal is:



My Daily Earning Goal

monthly amount needed / 4 weeks = £££

£££ / how many days per week you will work = daily amount needed

My daily earning goal is £





## STEP 03 Setting Up For Success

Follow the step by step videos and work book prompts to help you set up your business for success!

# Business Name Ideas

*Brain dump all possible ideas...*

*Here's a few pointers to consider when naming your business:*

- *It's ok to include your own name if you want as we are aiming for the personal touch*
- *It's ok to include location as you want to keep your work local to a certain area*
- *It's a good idea to include some business keywords so people know what it is you do, such as care, support, assist, personal.*

# The Business Name Checklist

Which name meets the criteria below:

1. Which name makes it clear what your business offers? Is it clear it's a business offering care? It's ok to include location as you want to keep your work local to a certain area.
2. Research shows that people do not like numbers and incorrect spellings in names. Does your name have numbers or incorrect spellings in it?
3. Social Media: The best way to advertise is to go through social media, of the platforms that you use, is your business name available?
4. Companies House Register: You do not need to register your business with companies house as you are self employed and not a ltd company. But it is a good idea to see if your name comes up as you don't want to trade under someone else's business name. Here's the link to check [companies house](#)
5. Check google for the name you wish to use, does it come up at all? You are looking for other businesses with that name and also checking there isn't anything dodgy about that name.
6. Is it available on your preferred email provider?

Name Checklist		
Is it clear what my business does?	✓	✗
Any numbers or incorrect spellings?	✓	✗
Available on social media?	✓	✗
Not registered on Companies House?	✓	✗
Does it come up on google?	✓	✗
Email available?	✓	✗





My business is called:

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Remember:

*Do NOT spend more than 48 hours on naming your business!*

# Setting Up For Success

## To Do

- ☐ Join PCN
- ☐ Carers Insurance (included in PCN membership if you are a member!)
- ☐ Car Business Insurance
- ☐ DBS up to date
- ☐ Post anticipation/market research post
- ☐ Create leaflet
- ☐ Set up social media business page
- ☐ Done some care training
- ☐ Clean up your personal social media profile
- ☐ Change your tagging settings
- ☐ Edit your Facebook business page url

My business email address is:

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My business bank account is with:

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STEP

## 04 Get Some Clients!

*This is the fun bit!*

*Now it's time to learn some marketing tactics and gain some clients!*

**Answer this:**

*What type of things do you help people with?*

*What makes your service better than other care companies?*

**Practice these answers!** 

# Get Your First Client!

## Social Media To Dos

- ☐ Post your launch post
- ☐ Post on social media every day for a week:
  - ☐ Mon
  - ☐ Tue
  - ☐ Wed
  - ☐ Thur
  - ☐ Fri
  - ☐ Sat
  - ☐ Sun
- ☐ Respond to every comment
- ☐ Thank each person that shares your posts

## Printed Advertising To Dos

- ☐ Write press release
- ☐ Send press release
- ☐ School newsletter
- ☐ Church newsletter
- ☐ Local newspaper paid advert
- ☐ Local advertising brochure
- ☐ Stall at local community events

Notes:

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# Leaflet Distribution

Leaflet Distribution Idea	Details
Leaflet drop all the houses in the area you wish to work	Roads I have posted on:
Put on local notice boards	Notice boards I have pinned on:
Post Office Leaflet drop	Where you left them:
Supermarket Notice Board	Shops I have pinned one up in:
Local Market	Pile left:
Chemist Leaflet drop	<p>Chemist: Location:</p> <p>Chemist: Location:</p> <p>Chemist: Location:</p>
In Your Car	The folder where I keep spare leaflets for handing out to people when the conversation crops up is kept:

# Build Your Reputation

Build Your Reputation	Details
<p>Arrange a meeting with the practice nurse of the local doctor surgeries</p>	<p>Surgery: Nurse's name: Date/time:</p> <p>Surgery: Nurse's name: Date/time:</p> <p>Surgery: Nurse's name: Date/time:</p>
<p>Arrange a meeting with the social prescriber of the local doctor surgeries</p>	<p>Surgery: Nurse's name: Date/time:</p> <p>Surgery: Nurse's name: Date/time:</p> <p>Surgery: Nurse's name: Date/time:</p>
<p>Local Community Hospital/Rehab</p>	<p>Hospital: Ward Sister's name: Date/time:</p> <p>Hospital: Ward Sister's name: Date/time:</p>
<p>Local Churches</p>	<p>Church: Contact's name: Date/time:</p> <p>Church: Contact's name: Date/time:</p> <p>Church: Contact's name: Date/time:</p>

# Build Your Reputation

Leaflet Distribution Idea	Details
Sheltered Accommodation Schemes	<p>Scheme: Warden's name: Date/time:</p> <p>Scheme: Warden's name: Date/time:</p> <p>Scheme: Warden's name: Date/time:</p>
Community groups	<p>Group: Contact's name: Location: Date/time:</p> <p>Group: Contact's name: Location: Date/time:</p> <p>Group: Contact's name: Location: Date/time:</p> <p>Group: Contact's name: Location: Date/time:</p>
Library	<p>Leaflet drop:</p> <p>Activity session: Contact's name: Date/time:</p> <p>Activity session: Contact's name: Date/time:</p>

# Your Ground Rules

*So that you can always enjoy your business, it's a great idea to set a few ground rules for yourself so that you don't accidentally compromise your joy.*

*What do you value in life?*

*What are your priorities?*

*What business rules will you set that will help you stick to your values and priorities?*



# First Initial Enquiry Form

Name of person ringing

\_\_\_\_\_

phone no. \_\_\_\_\_

Name of person who needs care

\_\_\_\_\_

\_\_\_\_\_

Location of the job

\_\_\_\_\_

\_\_\_\_\_

Rough idea of wants/needs

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Arrange a home visit

Date \_\_\_\_\_

Time \_\_\_\_\_

Take with you:

- ☐ Insurance certificate
- ☐ DBS
- ☐ Business Leaflet
- ☐ T&Cs note

# Working Out Needs Prompt

*Who makes your meals?*  
*Hot/cold lunch at lunch time?*  
*Anything you don't like?*  
*Allergic to anything?*  
*Who does the shopping?*

*Do you need help to get up in the morning?*  
*Are you an early riser?*  
*Can you manage to put shoes and socks on?*  
*What do you have for breakfast?*  
*Do you take medication at breakfast?*

*What time do you go to bed?*  
*Can you manage to get to bed yourself?*  
*Stairs?*  
*How do you manage getting ready for bed?*  
*Do you take medication before you go to bed?*

*Your house is lovely and clean, who cleans the house?*  
*Changing the bed*  
*Doing the laundry*

*Do you get the chance to go out and about much?*  
*What do you like to do?*  
*Where do you like to shop?*  
*Do you go to any weekly groups/church?*  
*Do you see any friends?*

*Family involved:*

*DNR in place? ☐*  
*(If so where is it kept)*

.....

*You've been shown* ☐  
*around the house*

# Essential Personal Information Sheet

Client Name:	
Home Address:	
Phone Number:	
D.O.B.:	
GP Surgery:	
Chemist:	
Any Allergies:	
DNR in place? If so, where is it kept?	
Power Of Attorney for Health in place? If so, who?:	
Power Of Attorney for Finances in place? If so who?:	
Key Safe Code:	
Any other important info?:	
Next of Kin: Contact No.s: Address:	
Emergency Contact 1:	
Emergency Contact 2:	

# Invoice Layout Example

Your Business Name

Your Name

Your Address

Your phone number

Ref: EDMT09/21 (reference number is customers initials, my initials, then month and year)

Date: 1st Oct 2023 (This is the date the invoice is sent on)

Customer Name

Customer Address

## INVOICE IN RESPECT OF:

<b>W/C 01/11</b>	1 hour morning time PA services	@ £25.00 x 1	£25.00
	0.5 hours lunch time PA services	@ £15.00 x 2	£30.00
	0.5 hours tea time PA services	@ £15.00 x 2	£30.00
	0.5 hours bed time PA services	@ £15.00 x 3	£45.00
<b>W/C 08/11</b>	1 hour morning time PA services	@ £25.00 x 1	£25.00
	0.5 hours lunch time PA services	@ £15.00 x 2	£30.00
	0.5 hours tea time PA services	@ £15.00 x 2	£30.00
	0.5 hours bed time PA services	@ £15.00 x 4	£60.00
<b>W/C 15/11</b>	1 hour morning time PA services	@ £25.00 x 1	£25.00
	0.5 hours lunch time PA services	@ £15.00 x 1	£15.00
	0.5 hours tea time PA services	@ £15.00 x 1	£15.00
	0.5 hours bed time PA services	@ £15.00 x 4	£60.00
<b>W/C 22/11</b>	1 hour morning time PA services	@ £25.00 x 2	£50.00
	0.5 hours lunch time PA services	@ £15.00 x 2	£30.00
	0.5 hours tea time PA services	@ £15.00 x 2	£30.00
	0.5 hours bed time PA services	@ £15.00 x 2	£30.00

**Total: £530**

Cheque payable to: Your name

Or bank transfer to: Your name, sort code / account number

Please ensure payment is made within 7 days of receipt of this invoice, thank you.

# Have you registered as self employed?

*Now that you have your first client, it's time to register as self employed!*

*Your UTR number:*

*Date of becoming  
self employed:*

## Managing Money Bonus!

Where My Money Goes	£ Amount
My Personal Monthly Outgoings/ My 'Wage'	£
Tax Fund	£
Holiday Pay Fund	£
Dream Fund	£
Buffer Fund	£
Business Costs	£
<b>Total</b>	£