

# Bright Horizons

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## Training Workbook





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## **Chapter 1:** **Introduction to Bright Horizons Training**

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### ***In this chapter...***

- ✓ ***Warm Up***
- ✓ ***Preview of the Bright Horizons training***
- ✓ ***Discussion: O'Leary's Positioning Statement***
- ✓ ***O'Leary's Extended Services Offering***
- ✓ ***Action Plans: Actions & Accountability***

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### ***Bright Horizons Training: A Preview***

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With so many players in the home health arena, it's quite often difficult to tell who is who. And as we move deeper into the 21st century, the senior population will increase. That means that our industry, in turn, will expand, bringing more and more players into an already-crowded industry, thus making it even more difficult to tell the difference between providers.

As O'Leary caregivers, we often spend significant amounts of time talking about how we are able to offer personal care and companion care to families and their loved ones. We

pride ourselves on being the most caring and committed senior care providers in the industry. We proclaim to be different than everyone else in the industry.

The problem is that so does everyone else.

The days of simply *talking* about being different are passing us by. It's time to genuinely *be* different. Not just *be* different, but to *create that difference*.



## ***Chapter 1: Introduction to Bright Horizons Training***

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A little over a year ago, O'Leary Home Health Care began to create that difference. Through industry-based and consumer-focused research, O'Leary has committed itself to revolutionizing the home health Care industry. And we begin today, with Bright Horizons.

Over the next few days, we will incorporate all of the pre-work that you've been working on with actual practice. By combining the pre-work that you completed with the application of that knowledge, we will teach you how to implement Bright Horizons at your office, establishing a new standard for home health care moving forward.

Over the next few days, we will...

- **Get some hands-on practice with the new assessment app**
- **Practice conducting an in-home assessment and reassessment**
- **Practice selling and positioning the value of O'Leary Home Health Care in several different situations**
- **Take a look at new collateral that you will use when positioning and selling O'Leary Home Health Care**

...and much more.

***Bright Horizons Training Agenda***

<b>Day 1</b> 1:00 pm- 5:00 pm Taking Bright Horizons to Market	<b>Day 2</b> 9:15 am- 1:15 pm Taking Bright Horizons to Clients	<b>Day 3</b> 9:15 am-1:15 pm Assessment, Reassessment	<b>Day 4</b> 9:15 am-1:15 pm Taking Bright Horizons Back to the Office
<b>Welcome/ <u>Chapter 1</u> Introduction to Bright Horizons Training (60 minutes)</b>	<b><u>Opening</u></b> (15 minutes) ✓ Review of Day 1	<b><u>Opening</u></b> (15 minutes) ✓ Review of Day 2	<b><u>Opening</u></b> (15 minutes) Review of Day 3
<b><u>Chapter 2</u> The Bright Horizons Assessment Application (60 minutes)</b>	<b><u>Chapter 5</u></b> Bright Horizons and Phone Intake Skills (90 minutes)  Skills Lab #2 ✓ Intake/ On the phone	<b><u>Chapter 7</u></b> The in-home visit and assessment (3 hours)  Skills Lab #5 ✓ Conducting the assessment	<b><u>Chapter 9</u></b> Financial Overview (2 hours)  Skills Lab #9 ✓ Entering prorated bill
<b><u>Chapter 3</u> Introduction to Selling Bright Horizons (30 minutes)</b>	<b><u>Chapter 6</u></b> The Pre-Meeting (1 hour)  Skills Lab #3 ✓ The pre-meeting	<b><u>Skills Lab #6</u></b> ✓ Assessment summary ✓ Finalizing the plan of care	<b><u>Skills Lab #10</u></b> ✓ Entering full bill
<b><u>Chapter 4</u> Bright Horizons and Referral Sources (90 minutes)</b>	Follow up  <b><u>Chapter 7</u></b> The In-home visit and assessment (45 minutes)  Skills Lab #4 ✓ The conversation starter	<b><u>Skills Lab #7</u></b> ✓ Presenting the client ✓ Explaining the billing and payment process  <b><u>Skills Lab # 7A</u></b> ✓ What if?	<b><u>Skills Lab #11</u></b> ✓ Entering reassessment bill  <b><u>Skills Lab #12</u></b> ✓ Back office report and scheduling
		<b><u>Chapter 8</u></b> Conducting the Reassessment (60 minutes)  <b><u>Skills Lab #8</u></b> ✓ Conducting the Reassessment	<b><u>Chapter 10</u></b> Wrap Up and Next Steps (30 minutes)



## **Activity: First Thoughts**

Based on what you have learned during the Ready training, what are your initial thoughts concerning Bright Horizons and the new direction we are creating for O'Leary Home Health Care and the in-home care industry? What are some of the questions you have? What additional information do you hope to come away with from this training?

## ***Objectives:***

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At the end of our training this week, you will be able to:

- ✓ ***Articulate why we are introducing this new business concept***
- ✓ ***Share with others the four differentiators of Bright Horizons***
- ✓ ***Explain clearly the seven service offerings of Bright Horizons***
- ✓ ***Position O'Leary Home Health Care using the sales new language***
- ✓ ***Discuss and explain the billing and payment practices of Bright Horizons***

## ***Ground Rules for the Training***

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- **Practice openness**
- **Listen actively**
- **Participate fully, at your own comfort level**
- **Speak from personal experiences**
- **Ask questions**
- **Treat others with respect**
- **Resist the urge to multi-task**
- **Have fun learning**

### Discussion: Five Things

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In your opinion, what are the *five most important things* that must happen in order to make Bright Horizons a success for your office? Work with your team and brainstorm these five items, and then be prepared to share them with the facilitator.

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## The Bright Horizons Process Map

Below is a great visual that illustrates what Bright Horizons looks like from the 10,000 foot level.

We see the key **differentiators** on the outside, and **activities/processes** that our care teams will provide to our clients within the cycle.

At the center of the process map is the **client**. The client is the reason for our being in business, and the reason for our looking at a new way to serve their needs and wants.

We will be referring to this process map throughout this learning experience.



The Bright Horizons Process Map

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## **Chapter 2:** **The Bright Horizons Assessment Application**

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### ***In this chapter...***

- ✓ ***A Review of the Assessment Process***
- ✓ ***How to log-in to the app***
- ✓ ***A brief review of the app functions***
- ✓ ***Discuss your selected client and homework***

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### ***Introduction***

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Our new client assessment process was developed through investigation, formal research, focus groups and deliberation. The objective was to position O'Leary Home Health Care at the forefront of home health care technology in the services that we provide to our clients.

Currently you will log into a website to access the assessment application. Once we have finalized the app with all iterations of feedback and changes, the app will reside locally on your iPad and will not require access via the web.

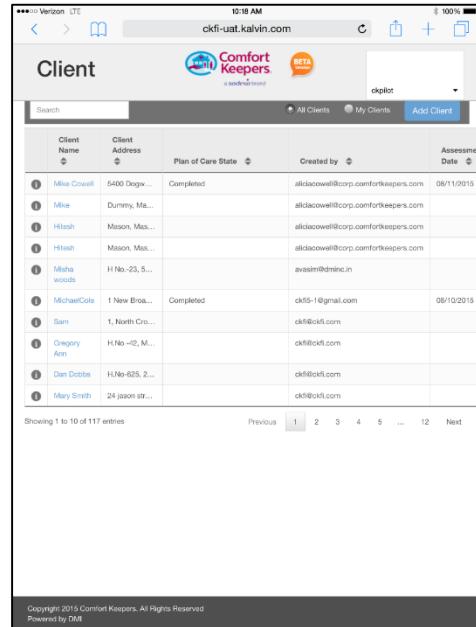
## Development Strategies for the Assessment Process

Our strategies and approach to developing the assessment and reassessment processes included:

- **The Development of a Clinically-Validated Application**  
Validated through clinical research, the app comprises tools that are...
  - ✓ **applicable to home care**
  - ✓ **easy to use**
  - ✓ **do not have licensure requirements**

To that end, the app...

- ✓ Was created based on **clinical research** conducted and provided by recognized institutions
- ✓ Is **evidence-based**
- ✓ **Avoids bias** and interpretation errors
- ✓ Is recognized by and has **credibility** within the medical community
- **Development of Care Services and a Personalized Plan of Care**
  - This personalized plan of care is designed to meet the specific needs of individual clients. Built into the app are tools that:
    - ✓ Calculate a score that predicts the risk of adverse outcomes
    - ✓ Create a custom care recommendation



The screenshot shows a mobile application interface for 'Comfort Keepers'. The top bar displays the URL 'ckfl-uat.calvin.com' and the time '10:18 AM'. The main screen is titled 'Client' and features a search bar. Below the search bar is a table with columns: 'Client Name', 'Client Address', 'Plan of Care State', 'Created by', and 'Assessment Date'. The table lists 117 entries, showing names like Mike Cowell, Mike, Hitesh, Meena, Michael, Sam, Gregory, Dan Dobie, and Mary Smith, along with their addresses and assessment details. At the bottom of the screen, there is a footer with the text 'Copyright 2015 Comfort Keepers. All Rights Reserved' and 'Powered by CKFL'.

Client Name	Client Address	Plan of Care State	Created by	Assessment Date
Mike Cowell	6400 Dogw...	Completed	alidacowell@corp.comfortkeepers.com	08/11/2013
Mike	Dunmy, Ms...		alidacowell@corp.comfortkeepers.com	
Hitesh	Mason, Ms...		alidacowell@corp.comfortkeepers.com	
Hitesh	Mason, Ms...		alidacowell@corp.comfortkeepers.com	
Meena	H No -20, 5...		avaseri@dmrc.in	
MichaelCob	I New Broa...	Completed	ckfl-1@gmail.com	08/10/2013
Sam	1, North Cr...		ckfl@ckfl.com	
Gregory	H No -42, M...		ckfl@ckfl.com	
Ann				
Dan Dobie	H No -825, 2...		ckfl@ckfl.com	
Mary Smith	24 Jason St...		ckfl@ckfl.com	



### Activity: Validated Tools

What are the validated tools that were incorporated into our new assessment/reassessment process?

List 3 validated tools that we incorporated into the assessment app.

1.

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2.

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3.

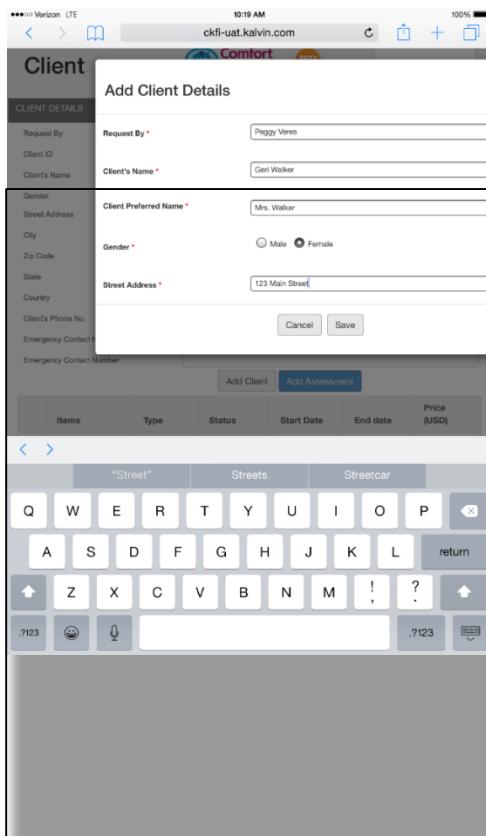
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## App Functionality

If you are used to using a tablet or an iPad, the app functions very similar to other apps you may have used.

Here is a brief review of the App Functionality...

- The initial pages of the app allow you to:
  - ✓ *Add a client*
  - ✓ *Edit an existing client*
  - ✓ *Enter an assessment for a new client*
  - ✓ *Reassess an existing client*



- Each section of the assessment has its own **tab** and **data collection pages**. Information that is entered into the app helps build the plan of care.
- In the background, financial information for each service offer is also being populated.
- Once all of the pages of the app have been completed, the app will produce an **assessment summary**. This summary will be discussed with the client and family, and you will make any service change edits before the assessment is submitted.
- Once submitted, the app produces two versions of the Plan of Care: the **Client Plan of Care** and the **Caregiver Plan of Care**.

- The client **Plan of Care**, or **Service Offer**, is then printed in the client home, the sale is closed and required contract documents signed before you leave the client home. You will no longer need to go back to the office, review the service offerings, calculate the service costs and hours, and then return to the client home to make the sale.

## **Tips for Using the App**

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1. Hold the iPad in landscape mode to view the entire page of the app
2. Make sure you disable your pop-up blocker before using the app – otherwise it will not allow you to view the back office report.
3. Settings>Safari>Block Pop-ups (turn off)
4. Double click the start button on iPad and all programs open will display. Swipe additional open programs up to close – this will prevent the App from disappearing.



### **Activity: Assessment Summary Review**

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During your pre-work, we asked you to select an existing client to compare your existing process with the app-based assessment process. Using your iPad app, let's begin reviewing the completed assessment pages for your selected client, and answer the questions below.

## ***What information remained the same for both processes?***

***What information changed or was not collected that you needed for the new assessment process?***

## ***What is the value to our clients in having this additional information collected?***

***How did your two assessments compare financially?***

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### ***What's Next?***

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As you begin working with the app during the live pilot phase, your skill in capturing the services detail will improve. In our next chapter we will do a quick review of the sales process as it relates to Bright Horizons.

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## **Chapter 3:** **Introduction to Selling Bright Horizons**

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### ***In this chapter...***

- ✓ *The Four Differentiators*
- ✓ *Features of Bright Horizons*
- ✓ *O'Leary's Six-Step Sales Process*
- ✓ *Review of the New Sales Language*

### ***Introduction***

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As a salesperson, your primary tool is language. You use language every day to paint a picture for potential clients. You use language to probe, to uncover a client's needs, and then you use language to discuss possible solutions for a client.

With Bright Horizons, our sales language is changing. O'Leary Home Health Care is the catalyst for the evolution of the home health care industry. Therefore, our language must evolve accordingly.

New service features provide new benefits to our clients, both current and new. These new service features and the benefits they afford our clients will shift our focus from how we talk about what it is that we do to how we can become life-long partners because of ***comprehensive service offerings*** and our ***evolving plans of care***.