

Bright Horizons

Training Workbook



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Chapter 1: Introduction to Bright Horizons Training

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*

Bright Horizons Training: A Preview

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

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

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



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?

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Objectives:

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

- 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

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.

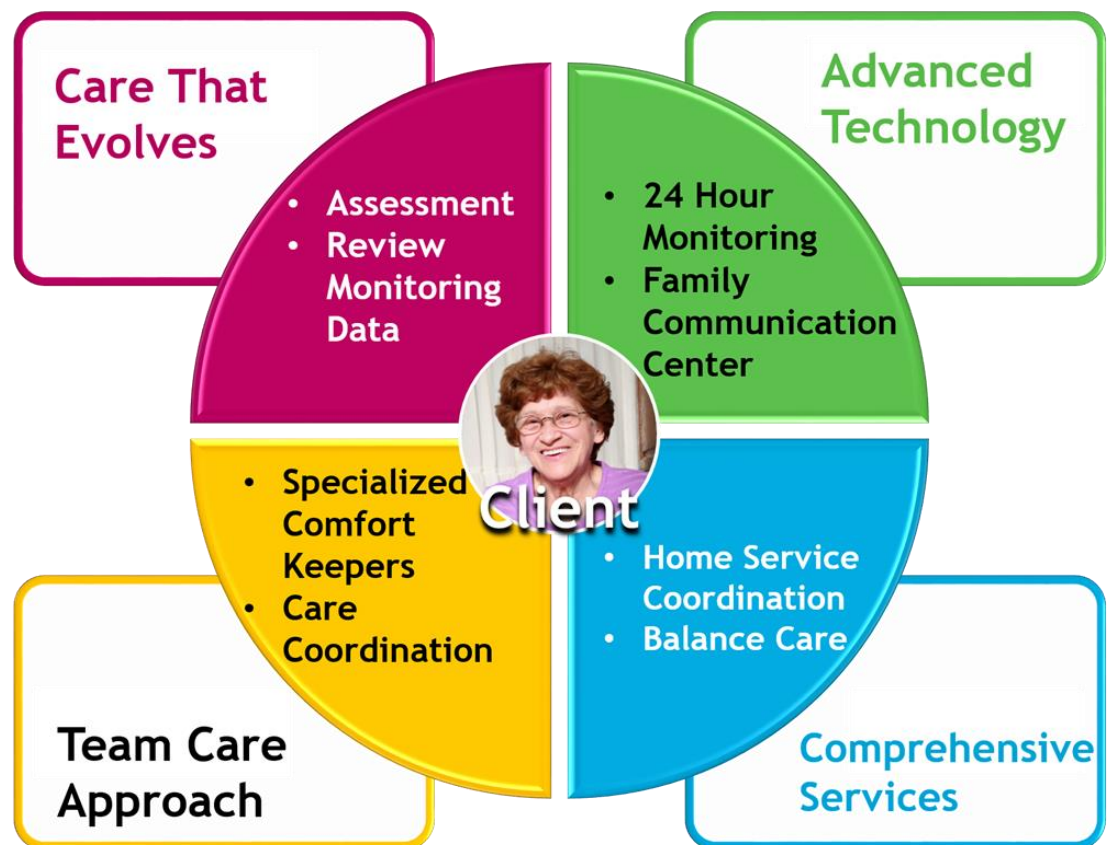
The Bright Horizons Process Map

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

Chapter 2: The Bright Horizons Assessment Application

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*

Introduction

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:

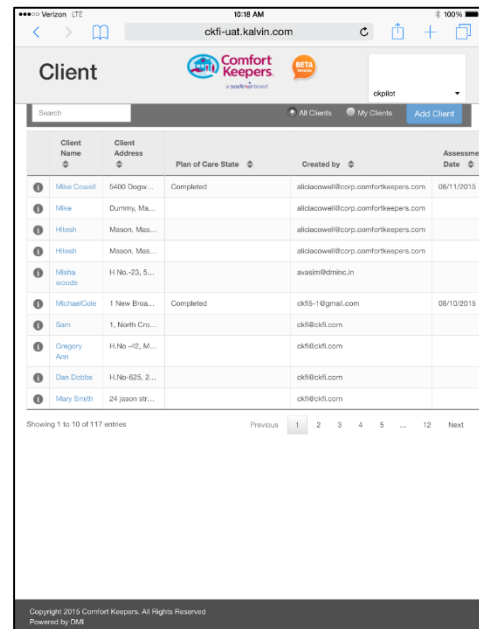
- **The Development of a Clinically-Validated Application**

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



The screenshot shows the 'Client' management screen of the Comfort Keepers app. It features a search bar at the top, followed by tabs for 'All Clients', 'My Clients', and 'Add Client'. Below this is a table with columns for Client Name, Client Address, Plan of Care State, Created by, and Assessment Date. The table lists several clients, including Mike Crowell, Mike, Hishah, Hishah, Maha, Michael Cole, Ben, Gregory, Dan, and Mary Smith. At the bottom, it indicates 'Showing 1 to 10 of 117 entries' with pagination controls.

Client Name	Client Address	Plan of Care State	Created by	Assessment Date
Mike Crowell	6400 Degre...	Completed	aliciaowell@corp.comfortkeepers.com	08/11/2015
Mike	Dumny, Ma...		aliciaowell@corp.comfortkeepers.com	
Hishah	Mason, Mas...		aliciaowell@corp.comfortkeepers.com	
Hishah	Mason, Mas...		aliciaowell@corp.comfortkeepers.com	
Maha	H No -23, S...		avasim@dmnc.in	
Michael Cole	1 New Broa...	Completed	ckit5-1@gmail.com	08/10/2015
Ben	1, North Cr...		ckit@ckit.com	
Gregory	H No -02, M...		ckit@ckit.com	
Dan	H No -625, 2...		ckit@ckit.com	
Mary Smith	24 jason str...		ckit@ckit.com	

- **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



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. _____
2. _____
3. _____

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

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

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?

Chapter 2: The Bright Horizons Assessment Application

How did your two assessments compare financially?

What's Next?

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.

Chapter 3: Introduction to Selling Bright Horizons

In this chapter...

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

Introduction

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***.