**Virtual (distant training program) Training Program:**

**Prior to live training, complete virtual and do the following:**

**Speak with licensing department**

**Create top 100 list**

**Complete Competitive Analysis**

**Session 1 (FE)**

**Understanding the Non-Medical Home Care Industry**

**Answer Questions at end of Video Presentation**

**One-On-One conference call with the Dream Team-To be scheduled**

**Session 2 (DG)**

**Competitive Analysis**

**Answer Questions at end of Video Presentation**

**One-On-One Conference call with the Dream Team-To be scheduled**

**Session 3 (BA)**

**Turn all incoming calls into new business (Part 1)**

**Answer Questions at end of Video Presentation**

**One-On-One Conference call with the Dream Team-To Be Scheduled**

**Session 4 (BA)**

**Turn all incoming call into new business (Part 2)**

**Answer Questions at end of Video Presentation**

**One-On-One conference call with the Dream Team-To Be Scheduled**

**Session 5 (DG)**

**Understanding the Payroll Model**

**Answer Questions at end of Video Presentation**

**One-On-One conference call with the Dream Team-To Be Scheduled**

**Session 6 (LM)**

**Building a top 100 referral list**

**Answer Questions at end of Video Presentation**

**One-On-One conference call with the Dream Team-To Be Scheduled**

**Session 7 (DG)**

**Using data to understand your business**

**Answer Questions at end of Video Presentation**

**One-On-One conference call with the Dream Team-To be scheduled**

**Session 8 (FE)**

**The Sherlock Holmes Approach to Client Satisfaction**

**Answer Questions at end of Video Presentation**

**One-On-One conference call with the Dream Team- To be scheduled**

**Key:**

**Frank Esposito (FE)**

**David Goodman (DG)**

**Lori Moshier (LM)**

**Barbara Akst (BA)**

**TBD, 2019 (Monday)**

9:00 - 9:30 AM Introduction, Opening Remarks with the Dream Team (FE, DG, JH)

9:30 - 11:00 AM Session 1-Marketing (DG)

Price Setting Strategy Analysis - Detailed analysis of Cost & Margins

11:00 - 11:15 AM Break

11:15 AM – 1:00 PM Session 2- Operations (FE)

Hiring Caregivers

1:00PM – 2:00 PM Lunch

2:00 – 4:00 PM Session 3-Marketing (JH)

Performing In-Home Assessments

4:00 – 4:15 PM Break

4:15 – 6:15 PM Session 4 – Careshyft Lab-Dream Team

Hiring Caregivers Interactive Exercises

Performing In-Home Assessments Interactive Exercises

**TBD, 2019 (Tuesday)**

9:00 – 11:00 AM Session 1- Operations (FE)

Recruitment and Retention of Caregivers

11:00 – 11:15 AM Break

11:15 AM – 1:00 PM Session 2- Marketing (DG)

How to Supercharge Your Agency: Understanding the Live-Business

Thinking outside the Box

1:00PM – 2:00 PM Lunch

2:00 PM- 4:00 PM Session 3- Operations (JH)

The Client Intake Process

4:00 PM-4:15 PM Break

4:15 PM – 6:15 PM Careshyft Lab-Dream Team

Recruitment and Retention of Caregivers Interactive Exercises

The Client Intake Process Interactive Exercises

**TBD, 2019 (Wednesday)**

9:00 – 11:00 AM Session 1-Operations (FE)

Providing Relief to Clients & Caregiver

11:00 – 11:15 AM Break

1 1:15 – 1:15 PM Session 2– Branding Requirements (MM)-VistaPro, Car Wrapping, Signage

1:15 – 2:15 PM Lunch

2:15- 4:15 PM Session 3- Operations (JH)

Operational Procedures

• Invoicing

• Payroll

• Managing Your Caseload

4:15 – 4:30 PM Break

4:30 PM - 6:15 PM Careshyft Lab

Invoicing Interactive

Payroll Interactive

Managing Your Caseload Interactive

Providing Relief to Clients and Caregivers Interactive

**TBD, 2019 (Thursday)**

9:00 AM-5:00 PM Building a Referral Base (LM)

Marketing Material Used for Building a Referral Base

Review Marketing Modules

Review Tip Sheets

Working with Case Managers

Performing Hospital In-Service

How to leverage a referral partnership to provide CEU Program

Hospital Zones of Opportunity

**TBD, 2019 (Friday)**

9:00 AM-12PM Session 1- Careshyft Lab-Dream Team

Sales and Marketing Interactive

Careshyft Lab-demonstration and interactive exercise of selling services to referral sources

12:00 PM- 1:00PM Lunch

1:00 PM – 3:00 PM Session 2-Dreamteam Oversight and Support

Website, Social Media & SEO

Access to Documents and other materials on Careshyft

Franchise Portal

Overview of Vendor Relationships

Report and Management Requirements

3:00 PM- 3:15 PM Break

3:15 PM- 5:00 PM Review

Q&A

**Key:**

Jeff Hatten (JH)

David Goodman (DG)

Frank Esposito (FE)

Lori Moshier (LM)

Maria Mattera (MM)

Ingrid Becket (IB)

Guest Appearance-Caregivers, Nurse, Clients

*End of Training!*