

SYLLABUS FOR LIVE & VIRTUAL TRAINING

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

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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

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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

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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

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Key:

Frank Esposito (FE)

David Goodman (DG)

Lori Moshier (LM)

Barbara Akst (BA)

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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

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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

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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 <ul style="list-style-type: none"> • 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

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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
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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

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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!