

**Leading Home Care**

*...a Tweed Jeffries company*

*The Center for Home Care Strategy and Leadership*

# Lunch 'N Learn with Leading Home Care

**A Facilitator's Guide to setting up  
Lunch Time Learning Programs using  
Live Teleseminars or recorded Audio CDs**

**for your**



**Home Care Managers & Supervisors**

**Home Care Sales & Marketing Team**

**Private Duty Team**

**Leading Home Care**

*... a Tweed Jeffries company*

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## Lunch 'N Learn Facilitator's Guide

Welcome to the Leading Home Care Lunch 'N Learn series. Thank you for your willingness to serve as the on-site facilitator for this learning system. Your role will be very important to the overall success of this learning program. This guide is provided to help make it easier for you to facilitate the learning process for your home care team members.

The learning content for this program is provided to you and your team live via audio teleseminars, or as a recorded program on audio CD. The audio CDs have been recorded during a live teleseminar. Whether dialing in to the live teleseminar, or listening to a recording of the teleseminar, you will find this content information most valuable in creating an exceptional learning experience for your home care team.

### The Role of the Facilitator

To Facilitate means... *"To make easy."* Your role is to help make the learning process easier for your team members. The role of the facilitator in this learning series is...

1. To prepare for the learning program
2. To set the stage for learning
3. To lead the question and answer phase of each session
4. To stimulate discussion after the presentation and Q&A phases
5. To make ideas visible
6. To summarize the results
7. To encourage action on the learning points.

**If you have any questions or suggestions, please let us know.**

**You can call us at 502-339-0653, or e-mail [Stephen@LeadingHomeCare.com](mailto:Stephen@LeadingHomeCare.com).**



Notes

## I. Pre-Program Preparation

Two days before the Lunch 'N Learn takes place, you should complete the following pre-program preparation:

- Download copies of the learning guide for participants from the Leading Home Care web site... [www.leadinghomecare.com/teleseminars](http://www.leadinghomecare.com/teleseminars).
- Download the CEU registration form and evaluation form.
- Make copies of the learning guide for each person who will be attending.
- Make copies of the CEU evaluation form for each person who will be attending.
- Send a reminder of the time and location to each participant.
- Ask everyone to be in the room at least ten minutes before the program begins.
- If you are dialing in to a live teleseminar, make sure you have the phone number and pass code to access the telephone bridge line. Check your speaker phone to make sure it is available and working properly.

## II. Setting the Stage

Making sure that the room setup is conducive to learning is a very important part of the facilitator's role. Here are some things you can do to set the stage:

- Check the CD Player or speaker phone to make sure the system is working effectively.
  - Arrange the room so that your team members can see you and hear the audio conversation.
  - Have a flip chart and markers in the room. Pre-write each discussion question for the session at the top of a flip chart page. Discussion questions will be provided in the learning guide for each session.
  - Check the room temperature, ventilation, and lighting so that everyone is comfortable.
  - Turn off any background noise, including fans, blowers, overhead paging or telephone intercom. Disconnect any other telephones in the room so there is no background noise.
  - Ask participants to put pagers and cell phones on the "stun" mode. ☺
- This is a serious leadership learning experience. Encourage the participants to take it seriously. Be a role model for serious learners.



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### III. Starting the Lunch 'N Learn Program

Start on time. Each program will run from 60 to 70 minutes.

Here's how to get started:

- Ask everyone to sign in on the CEU registration form.
- Give a brief introduction of the topic to be covered.
- Make sure everyone has a learning guide.
- Dial in to the telephone bridge line using the phone number and pass code provided, or start the CD.

### IV. Questions and Answers

The live teleseminars will have a question and answer period at the end of the hour. The moderator will give you instructions before opening the lines for questions. As the facilitator, your role is to encourage participants at your location to ask questions. Have the person asking the question move close to the speaker phone, speak loudly, identify themselves and your company, and ask the question. The moderator will acknowledge the question and the guest expert will provide the answer. Stay on the line for follow up questions.

You may also email your questions during the teleseminar to **Jason@leadinghomecare.com**. The moderator will read the question.

If you are using the recorded CD, some CDs contain the question and answer session from the live teleseminar. If you or any of your participants have any questions for the presenter, please feel free to e-mail your questions or comments to **Stephen@leadinghomecare.com**. We will answer you promptly.



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## V. Group Discussion

After you finish listening to the live teleseminar or the CD, you will want to lead a discussion of the learning points covered in the program. At the end of the learning guide, we will provide discussion questions for each session. Here are some suggested ways to make the discussion more meaningful:

- Write each question on the top of a flip chart page prior to the program.
- Lead a discussion of each question. Write the team members' responses on the flip chart.
- Ask follow up questions to stimulate discussion.
- Summarize the discussion and review the responses to the discussion questions on your flip chart sheets.

## VI. Review & Reinforcement

The learning doesn't stop at the end of this session. There are a number of things you can do to reinforce the learning:

- Make sure everyone has signed in on the CEU Registration Form.
- Ask everyone to complete and sign the CEU Evaluation Forms.
- Mail the CEU registration form and the evaluation forms back to us at Leading Home Care. You may keep copies for your own records if you wish. We will process the records and send CEU Certificates back to you for distribution to the participants. \*We must have a signed evaluation form in order to issue a CEU certificate.
- Type up the responses to the discussion questions from the flip chart pages.
- Distribute copies to all participants.
- Encourage participants to listen to the CD of the program again to reinforce their learning.
- Go back to **I. Pre-Program Preparation** to get ready for the next Lunch 'N Learn.



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**Sample Discussion Questions**  
**Session I**

1. What can we do to refine, communicate, and live our Mission?
2. What can we do to communicate and live our Values?
3. What makes us unique in our marketplace? How can we gain and sustain competitive advantage over the other home care companies in our community?
4. What can we do to increase our revenue in order to fuel our economic engine?



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## Sample Lunch 'N Learn topics available from Leading Home Care

You are participating in a unique learning experience. There is no place else in the world where you can experience the interactive discussion of the topics on this list, and have access to the experts to answer your questions. Here is a list of learning programs on CD from Leading Home Care.

### Business Development

- The Magic is in the Mix: Transforming Home Care Sales & Marketing - Stephen Tweed
- Grow Your Private Duty Business - Stephen Tweed
- Strategic Staffing in Home Care - Stephen Tweed
- Creating a Customer Service Culture - Stephen Tweed & Dan Cassin
- The Seven-Step Relationship Selling Process - Stephen Tweed
- Special Skills for Communicating with Physicians - Stephen Tweed & Dr. Tray Dunaway
- Developing Client Rapport & Building Customer Relationships - Stephen Tweed
- Mastering Persuasion: Closing the Sale - Stephen Tweed

### Leadership Development

- Seeing the Bigger Picture - Stephen Tweed & Elizabeth Jeffries
- Forces & Trends Shaping the Future of Home Care - Stephen Tweed & Elizabeth Jeffries
- Strategic & Operational Planning - Stephen Tweed & Elizabeth Jeffries
- Setting Priorities & Managing Time - Stephen Tweed & Elizabeth Jeffries
- Problem Solving & Decision Making - Stephen Tweed & Elizabeth Jeffries
- Finding and Keeping Great People - Stephen Tweed & Elizabeth Jeffries
- Inspiring Others to Follow YOU - Stephen Tweed & Elizabeth Jeffries
- Measuring Team Performance - Stephen Tweed & Elizabeth Jeffries

### Private Duty Home Care

- Marketing Private Duty Home Care - Gwen Watkins
- Public Relations in Private Duty Home Care - Merrily Orsini
- Selling Private Duty Home Care - with Denise Spiewak
- 33 Tips to Grow Your Private Duty Revenue - Stephen Tweed & Jason Tweed
- Increase Your Income through Effective Office Operations & Scheduling - Rick Morey
- Increase Your Income through Effective Staffing - Stephen Tweed & Kathleen Bailey
- Increase Your Income selling to Bank Trust Officers - Stephen Tweed & Jason Tweed

For a preview of upcoming live Teleseminars, go to [www.leadinghomecare.com/teleseminars](http://www.leadinghomecare.com/teleseminars).



## About your Leading Home Care Teleseminar Team

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For the past 20 years, **Stephen Tweed** has worked with home care companies around the country that want to grow their businesses, and with home care leaders who want to multiply performance. He is currently Chairman and CEO of *Leading Home Care... a Tweed Jeffries company*, the center for home care strategy and leadership.

Stephen has served on the Boards of Directors of three different home care companies, and as the Interim President and CEO of a \$25 million home care company with 400 employees. He has written three books and dozens of articles on strategy and leadership, and he is the father of a 33 year old son who lives in a wheelchair and uses the services of home care on a daily basis. Stephen also is serving as the Immediate Past President of the 3500 member National Speakers Association.



**Elizabeth Jeffries, RN, CSP, CPAE** is a relationship strategist and CEO of *Executive Mastery... a Tweed Jeffries Company*. She consults with and coaches healthcare and business leaders who want to master their influence with their work teams and their customers, and multiply their own performance. Elizabeth is an award winning speaker, columnist, and author of several books, including *The Heart of Leadership: How to Inspire, Encourage and Motivate People to Follow You*. Over one million people in more than 3000 presentations have participated in Elizabeth's "can-do, how-to" programs. From General Electric, to the Crystal Cathedral, and from the American Hospital Association to Churchill Downs, her clients are businesses, healthcare organizations, and professional associations



**Jason Tweed** is the Director of Business Development for Leading Home Care. He is responsible for the design and implementation of all of our electronic marketing, and for customer service and order fulfillment. A graduate of the School of Communications at Edinboro University of Pennsylvania, Jason has spent the last 14 years working in a variety of communication and business development positions with a large insurance company, a public utility, a consulting firm, and a community service organization. Since 2002, Jason has led the business development efforts at Leading Home Care. Jason also operates BSG marketing, an Internet marketing company. He and his wife Kristen live in Reading, PA, and are the proud parents of twins... Jason Andrew and Ainsley Grace. (Stephen & Elizabeth's first grandchildren!!!)



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## Your Moderator for the Leading Home Care Teleseminar Series



**Dan Cassin** brings us more than 20 years of experience in sales and customer service in financial services, residential construction, and home care. Dan works with *Leading Home Care... a Tweed Jeffries company*, and our sister company *Lighthouse Learning Systems... a Tweed Jeffries company*, as a learning program facilitator. Dan presents educational programs on sales and customer service for home care companies, and is the director for a major project to create a customer service culture in the hospitality industry in Greater Louisville. Dan also serves as the moderator for our three different teleseminar series here at Leading Home Care.