



HEALTHCARE'S ENGAGEMENT EXPERTS



Change Your Culture and Transform your Patient Experience

A dysfunctional culture is the single greatest barrier to a healthcare organization's effort to provide a truly great patient experience.

Custom Learning Systems is recognized as a leading expert in helping organizations transform their service delivery by creating a 5-star culture of healing kindness and accountability throughout.

We achieve this through dynamic keynote presentations and comprehensive educational initiatives, both in person and digitally, to improve patient satisfaction through employee engagement and thoughtful, personalized coaching and consulting.

For over 35 years, hundreds of healthcare organizations began their journey to excellence in patient satisfaction by picking up the phone and contacting us.



Brian Lee CSP HoF
CEO and Founder



OUR MISSION

Creating a 5 Star Culture of Healing Kindness



OUR VISION

Kindness Care Everywhere



OUR CREED

We make a difference in the lives of people who make a difference in the lives of people



WE BELIEVE IN

- Relationships first, business second
- Innovation - there's always a better way
- Engagement matters - we're all in
- Together we're better
- Excellence in everything

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p4 Engage

Engage patients, caregivers, and providers through our robust CareSay™ Suite platform of twelve digital listening and response improvement solutions.



p5 Empower

Empower caregivers at every level through the Everyone's a Caregiver® Micro-Webinar System, to deliver a 5 star patient experience.



p6 Transform

Transform your organization and create a 5 star culture of healing kindness through our dynamic Service Excellence Initiative™ on-site training system.



p8 Celebrate

Our mission is to celebrate and inspire caregivers. In addition to brilliant keynote presentations, we host two key recognition celebrations: The Summit Awards and The Breakthrough Awards.



p8 Inspire

Brian Lee CSP, HoF
Since 1984, Founder and Engagement Expert, Brian has inspired audiences through his dynamic and inspirational keynote presentations.



p8 Trust

Brian leads a faculty of trusted engagement experts, who collectively offer over 500 years of healthcare expertise.



Disrupting the Way Healthcare Listens to Improve

CareSay™ Reviews

- CareSay™ Reviews (www.caresay.reviews) platform is a tool to connect you directly to your patients in real time and empowers 2-way unfiltered communication. All of these contribute to a culture of 5 star patient engagement, including:
 - ▶ Providing pre-emptive service recovery
 - ▶ Short-circuiting negative social media ratings
 - ▶ Automated Google 5 star rating
 - ▶ Receiving important patient requests
- CareSay™ Snapshot real-time 6 question micro-survey

CareSay™ Rounding Tools

CareSay™ Rounding is a customizable rounding tool that allows leadership and caregivers to track, measure, and improve feedback in five key ways:

- ▶ Nurse Leader Patient Rounding
- ▶ C-Suite New Patient Welcome Visits
- ▶ C-Suite Caregiver Rounding
- ▶ Leader Daily Staff Rounding
- ▶ Nurse Hourly Rounding

CareSay™ Caregiver Engagement Survey

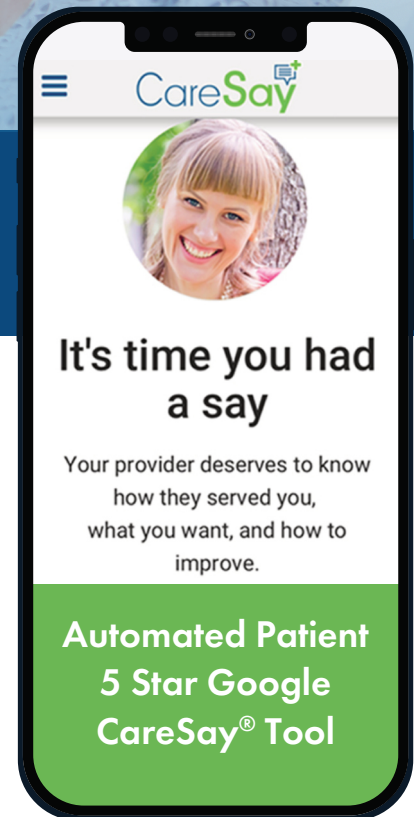
CareSay™ Caregiver Engagement is a confidential digital survey tool to survey employees. This tool can be used on any time interval needed to continually improve a patient driven culture.

CareSay™ Caregiver Empowerment Survey

Through this confidential digital survey process, leaders are evaluated by their direct reports for the purpose of providing opportunities for improvement.

CareSay™ Internal Services Scorecard

An invaluable and continuous quality improvement tool for leaders and caregivers who provide internal support services.



CareSay is the Trip Advisor of patient care



**Everyone's
a Caregiver[®]**
Micro-Webinar

Creating a 5 Star Culture of Healing Kindness through Digital Innovation

Everyone's a Caregiver[®] **HCAHPS Hospital of Choice[™]**

A time-sensitive web-based learning tool to empower everyone to master the skills, competencies, and best practices of improving the patient experience.



Everyone's a Caregiver[®] **Patient Centered Clinic[™]**

Includes 50 modules structured into the five CG CAHPS patient experience survey domains.



Everyone's a Caregiver[®] **Transform the Resident Experience[™]**

Targeted for three key audiences: Core Q Skills for Everyone, Core Q Skills for Nurses, and Skills for Leadership.



Everyone's a Caregiver[®] **5 Star Nurse[™]**

Creating a healing relationship through kindness and TRUST. These 19 modules are designed for nursing at all levels using the Nurse TRUST checklist.



Everyone's a Caregiver[®] **5 Star Survey Mastery[™]**

Mastering the core competencies of patient experience survey ratings and improvement. Designed for leaders and caregivers, whether directly at the bedside or ancillary and support services.



Everyone's a Caregiver[®] **5 Star Physician[™]**

Creating healing relationships through kindness and TRUST. These 19 comprehensive modules are tailored for physicians at all levels, utilizing the Physician TRUST checklist.



Everyone's a Caregiver[®] **Caregiver Heroes[™]**

Five-minute Micro-Webinars with positive and uplifting messages of hope and support.



Mastering the New HCAHPS Webinar Series

A 13-part dynamic, high impact, and practical education series designed to achieve sustainable improvement in HCAHPS patient experience scores.



Key Benefits of the Custom Learning Systems' Service Excellence Initiative™



5 Star Rating

- Implementation of the Service Excellence Initiative™ leads to 5 star recognition within 3 years
- 12 of CLS's most recent clients have seen their audited HCAHPS patient experience scores increase by an average of 46 percentile in 8 of 11 domains in their first year



Hardwire Best Practices

- Leaders participate on inter-departmental teams to successfully hardwire strategic best practices essential to earning a 5 star reputation including:
 - ▶ Service Recovery
 - ▶ Onboarding and Retention
 - ▶ Awards and Recognition
 - ▶ Keywords and Sentence Starters



Frontline Engagement, Empowerment and Ownership

- Each year CLS trains your brightest and best frontline employees to teach a workshop to their peers
- A key feature of the workshop is 7 key License to Please™ empowerment skills that achieves a shift in the attitude of employees from renters to owners



Nursing/Clinical Staff Patient Experience Education

- Gives great weight and focus to strengthening nurse leader's skills, nursing best practices and frontline nurse engagement



Leadership Training

- All managers and supervisors participate in annual high-impact leadership skills training that "turns managers into leaders"



Physician Education and Engagement

- Incorporates a comprehensive process for educating, engaging and coaching physicians and advanced care practitioners to enhance their professional practice and improve patient experience scores

"This is the process I dreamed of! The structure and timeline allows for some quick wins but overall change that is sustainable! There are many more MRHC cheerleaders now!"

– Emily Mouser, VP HR, McAlester Regional Health Center



Service Excellence Council

- We collaborate with you on the appointment and development of an effective Service Excellence Council to lead and coordinate this initiative on an ongoing basis



Implementation Coordinator

- CLS takes 100% responsibility for training and supporting your Implementation Coordinator to facilitate every aspect of the day-to-day operation of this initiative



Enhanced Online Digital Training Tools

To complement the on-site training, this initiative includes the following:

- CareSay™ Suite – One dynamic system; twelve seamless ways to listen and improve
- Everyone's a Caregiver® Micro-Webinar System – Provides 3–5 min. education modules organized into four bundles



Ignite the Patient Experience

- The two-day "Ignite the Patient Experience" is an opportunity for the organization to engage everyone at every level to support a culture change that focuses on patient experience and staff engagement



Guaranteed Investment

- This initiative comes with a one year money back guarantee
- The Service Excellence Initiative™ is eligible for key grant programs. Partial budgets from training, advertising, and other areas are often reallocated to make up the investment



Three-year Blueprint to Hardwiring a 5 Star Experience™

- CLS submits a comprehensive, custom-tailored, step-by-step three year blueprint to enable your team to earn a 5 star patient experience reputation



Long-Term, Sustainable Competitive Advantage

- Win back patients who have left you, and grow market share through the delivery of a consistent 5 star culture of healing kindness



CELEBRATE

with the HealthCare Service Excellence Conference

For an entire year, our organizing team prepares an extraordinary learning experience for all levels of staff that focuses on achieving the highest standard of customer service delivery, both to customers/patients and amongst staff. Your team will discover leading edge strategies and skills, experience revitalized enthusiasm and momentum for your customer and employee satisfaction programs, and learn from other people's success through networking with peers. This amazing event takes place in November of each year.



INSPIRE

Keynotes to Engage, Empower & Transform

Put Brian Lee to work for you and your audience to create a 5 Star culture of healing kindness.

"There was so much power and energy in the room during Brian's presentation. It was the most engaged and energized I have ever seen my management team."

– John Peterman CEO,
Riverside Health System, Riverside, VA

"Oh my goodness! Instead of 'Aha' moments, I had so many 'OMG' moments. Brian has such a simple and profound way to present this education. Excellent content."

– Tammy Jantzen COO,
Okeene Hospital, Okeene, OK

Our Trusted Engagement Experts



Pat Goodberry
Chief Operating Officer



Mark Brodeur
MHA, CPXP
VP of Partner Success



Ron Webb
FACHE, MBA, MHA
VP of Process Improvement



Dennis Shelby MSW
VP of Process Improvement



Michael Kolenda
MD, AMIM, ABA, ABPM
VP of Process Improvement



Rachel Spalding
DNP, RN, NEA-BC
VP of Process Improvement



Michael Bayer MBA,
CSP, AS, LEAN Black Belt in Healthcare
Implementation Specialist



Tim Durkin CSP
Implementation Specialist



Richard Hadden
MBA, CSP
Implementation Specialist



Lynn Sullivan
CHRE, CCP
Implementation Specialist



Andrew Lewis
MTS, CMed, CMT, WFA
Implementation Specialist



Michele Matt
CSP, CVP
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Kevin Robbins MDiv
Implementation Specialist



Fran Kick MA, CSP
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Mira Rollins OTR
Implementation Specialist



Larry Chatterton
Implementation Specialist



Tara Miller BA, MC
Implementation Specialist



Angie Schierer
DBA, MHA, RN
Chief Nursing Officer