

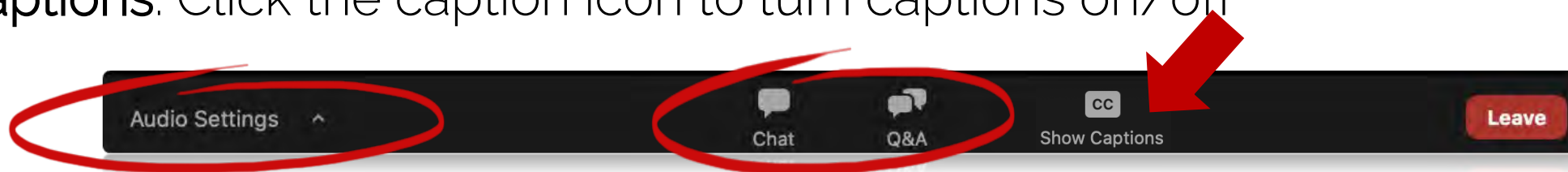


Pitching Your Experience Strategy to the C-Suite

August 29, 2023

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- Receive follow up email tomorrow with webinar slides, recording and link to survey.

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Our Speakers



Nicole Cable, MHS, CPXP, LBBP
Chief Experience Officer
CareMax



Mark Llorente, MBA
*Chief Administrative Officer &
Head of MSO Operations*
CareMax



Creating Alignment & Shared Ownership to Advance the Human Experience

*Pitching Your Experience
Strategy to the C-Suite*



Objectives:

- Who Is CareMax?
- The Creation of the Office of Human Experience (OHX)
 - Development and buy-in of the strategy
- The Power of Team with other C-Suite Executives
 - What successes did we achieve
- Lastly, tools/advice on how to win over the C-Suite



WHO IS CAREMAX?

Mark Lorente

Why CareMax Exists

More Seniors Require
Higher-Touch Care


80% of seniors have two
or more chronic conditions³

Population Is Aging

Over 73 million
Seniors by 2030⁴

System Needs
Disruption

~25% of ~\$4 trillion of
annual healthcare spend is
wasted⁵



**The solution to a sustainable
healthcare system is an
integrated delivery system
that aligns incentives between
providers and patients**

¹ KFF analysis referencing the 2022 Annual Report of the Boards of Trustees of the Federal Hospital Insurance and Federal Supplementary Medical Trust Funds. ² Congressional Budget Officer (CBO). 2022. "May Congressional Budget Office Medicare Baseline for 2022." ³ National Council on Aging. 2021. ⁴ United States Census Bureau National Population Projections. 2017. ⁵ Journal American Medical Association (JAMA). 2019. "Waste in the US Health Care System".

80% of Health Outcomes Are Determined by Factors that Occur Outside of Medical Care

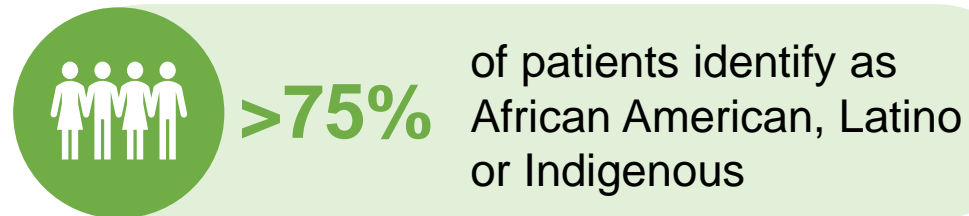
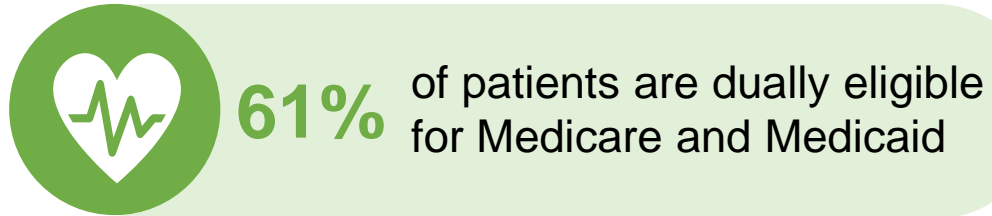
That's why we focus on

- 1 The **mental and physical** wellbeing of our patients and team members
- 2 Providing **social** activities and **wellness** classes
- 3 Training care teams to **interact with patients and their families**
- 4 **Being aware of biases** that impact the welfare of patients

CareMax Is Committed

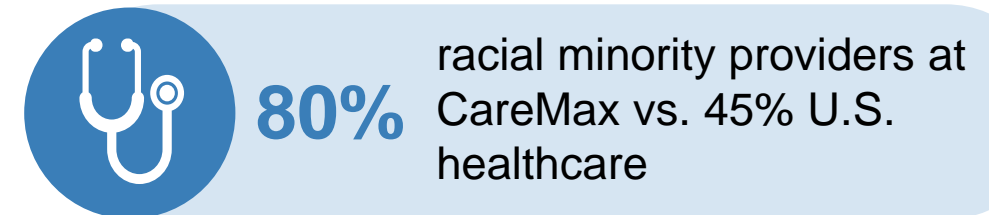
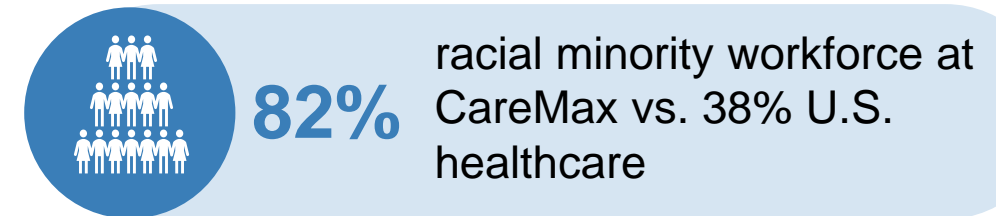
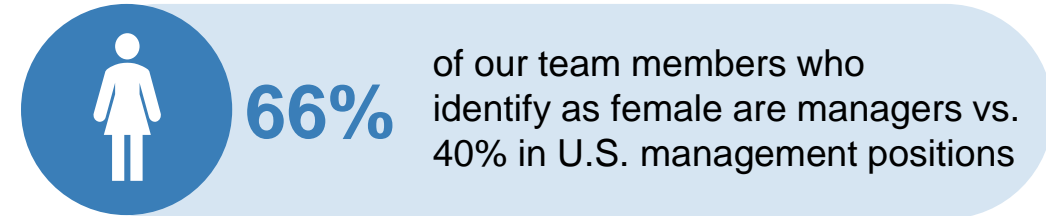
to Diversity, Equity, Inclusion and Belonging in All Areas of Our Organization

Our Patients



Note: All data as of December 31, 2022, unless otherwise noted.

Our Team Members





Introducing the Office of Human Experience (OHX)

Nicole Cable



What Makes CareMax Unique

- 1 Integrating the inseparable relationship between patient and caregiver experience
- 2 Elevating experience as a top priority
- 3 Positions CareMax as an industry leader in experience and differentiates us from the competition

Wolf, Jason A. PhD; Niederhauser, Victoria DrPH, RN; Marshburn, Dianne PhD, RN, NE-BC; and LaVela, Sherri L. PhD, MPH, MBA. (2021) " Reexamining "Defining Patient Experience": The human experience in healthcare," Patient Experience Journal: Vol. 8: Iss. 1, Article 4. Available at: <https://pxjournal.org/journal/vol8/iss1/4>

The Pitch

- Review of the Office of Human Experience “OHX”
- Executive Summary: Current state of Experience at CareMax for all stakeholders
 - Leverage both qualitative and quantitative data
- Immediate priorities/ Key initiatives for OHX
 - Timeline and milestones for key initiatives
 - Resources required



Creating Alignment & Buy-In Along the Journey to a Strategy

ASSESS, LISTEN & LEARN	ALIGN ON GOALS & IDENTIFY STRATEGIES/TACTICS	CRAFT THE ROADMAP & EQUIP LEADERS
<ul style="list-style-type: none">• Leadership interviews• Patient / family interviews• Employee / provider focus groups• Deep dive into metrics that matter• Shadowing / observation• Environmental / best practice inventory• Internal and external surveys	<ul style="list-style-type: none">• Town Hall report outs and discussions• Detailed report outs and discussion in key leadership meetings• Interactive leadership workshops focused on strategy and tactics development• Workgroup / task force creation• Readiness testing with leadership	<ul style="list-style-type: none">• Strategies and tactics organized into easy-to-understand “buckets”• Strategy compass developed to communicate the strategy clearly and consistently• Implementation planning meetings with key leaders• Robust communications plan targeted toward unique audiences within CareMax

Introducing the Chief Experience Officer (CXO)

Review of the Role of CXO

The CXO leads the Office of Human Experience (OHX) and held accountable for the sum of all interactions – shaped by an organization's culture, values, systems and programs – that influence:

Patient experience, or the perceptions and retention of a patient and their loved ones across the full continuum of care.

Team Member experience, satisfaction and retention

Provider experience and their performance, retention and outcomes

The CXO is responsible for:

1. Increasing the understanding of customers among all employees
2. Increasing the understanding of employees among company leaders
3. Driving deliberate, disciplined design and delivery of experiences to customers and employees
4. Creating connections between CX and EX, and advocating for the integration they require, whether technical or otherwise
5. Championing customers' and employees' perspectives in the company's strategic decision-making
6. Measuring the impact of CX on employees, the impact of EX on customers, and the impact of both on the company's KPIs

Introduction to Our New CXO

Nicole Cable

Extensive history in human experience in healthcare, hospitality, and customer service

Chief Experience Officer at InovaCare Health

Director of Patient Experience at ChenMed (2.5 yrs.), as well as University of Maryland Medical System -UMMC & Laurel Regional Hospital, (8+ yrs.)

Marriott (10 yrs.)

Master's degree in Public Health and Doctoral Student in Social/Public Policy

2023 Influential Business Women South Florida Business Journal, 2022

CX Network Global Leader to Watch

Board Member, Advisor and Public Speaker and Contributing Writer in patient experience, learning & development, diversity, equity, and inclusion space



Aligning on the mission and mandate of the Office of Human Experience (OHX)

“Great employee experience leads to great customer experience.”

CareMax’s Office of Human Experience (OHX) leads the holistic, scalable strategy to establish us as the preferred partner for team members, providers, patients, and patients’ loved ones by delivering a best-in-class experience, advancing the organization’s most important goals, and ultimately achieving revenue growth. We are a partner to every facet of the organization, working collaboratively to differentiate CareMax as a leader in experience and engagement -- and in the results we achieve.

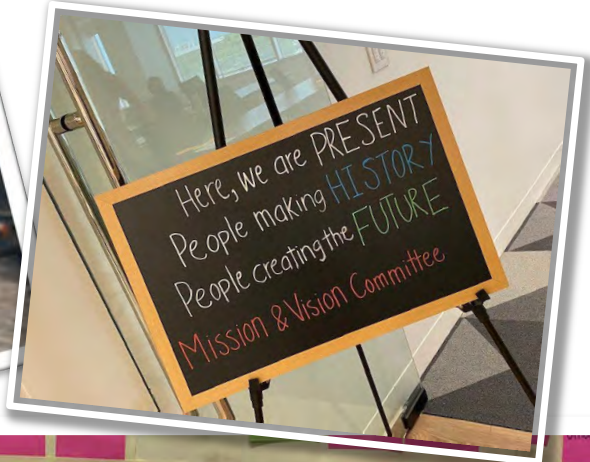
When done effectively, a comprehensive experience and engagement strategy will result in lower costs; increased patient, provider, and employee retention and satisfaction; improved clinical outcomes; and a more responsive, human-centered organization.

Mission of OHX core tenets		
Infrastructure	Vision and Strategy	Elevate experience as a top priority by rallying our people around a shared vision and formalizing a scalable, evidence-based approach to support future growth.
Patients and Families	Care, Connection & Retention	Listen and be responsive to the needs of our patients and those that love them and deploy best practices to fuel exceptional care, service and connection .
Team Members & Providers	Culture, Communication & Development	Foster a resilient culture through engagement and development of our people, attract and engage the very best talent , and reduce burnout and turnover .
Accountability	Insight and Reporting	Develop actionable insights from data reporting and benchmarking regarding patients’ needs and preferences , driving improvement efforts to maximize revenue potential .



Nicole Cable - Chief Experience Officer

Establishing a Compelling Mission and Vision



Developed by Our Team Members

• Our Mission

To improve lives through kindness, compassion, and better health.

• Our Vision

Bring “Health with Heart” to communities that need it most to end disparity and create a sustainable healthcare system.

• Our Core Values



CORE VALUES

COURAGE

WHAT IT MEANS

We are transforming the healthcare industry across the country, and it takes courage to shape the future. We embrace the energy and power of the heart to move through fear to take specific actions we know will be difficult.

HOW WE EXPRESS IT

We speak the truth, no matter how difficult the truth may be for others to hear. We say what needs to be said, even if it involves acknowledging mistakes. We believe we can accomplish anything we set our minds to.

RESULT

A workforce of leaders who experiment, learn, adapt, and move in the right direction.

COMPASSION

WHAT IT MEANS

It's how we treat one another. Compassion comes down to finding that human connection to serve others with empathy, respect, and dignity.

HOW WE EXPRESS IT

We first practice self-compassion to be mindful of our struggles and respond with compassion, kindness, and support. We try to walk in the shoes of the people we serve and work with. We listen generously and are fully present in the moment.

RESULT

A culture that whole-heartedly supports one another's personal and professional development.

EMPOWERMENT

WHAT IT MEANS

We believe that everyone is empowered to make a difference in our workplace. We seek direction from our leaders and accept responsibility to act with freedom and accountability.

HOW WE EXPRESS IT

We foster an environment of trust and open communication. We transfer knowledge and skills to others for the benefit of the team, honor these characteristics, and defer to those with the most expertise, regardless of position.

RESULT

An environment grounded in entrepreneurial spirit that moves at a fast pace and follows through on our commitments. We approach challenges with a positive “can do” attitude and believe an optimistic outlook allows us to persist, be resilient, and inspire those around us.

DEIB

DIVERSITY, EQUITY, INCLUSION, BELONGING

WHAT IT MEANS

We recognize the contributions of all team members from our diverse workforce. Inclusion expresses our commitment to racial and cultural equality by creating a sense of belonging. We encourage our team members to bring all of themselves to CareMax. When we include and embrace everyone's unique contributions, we become a stronger organization.

HOW WE EXPRESS IT

We encourage fearless engagement in the communities we serve and throughout our organization.

RESULT

An environment where all individuals feel welcome no matter their background. A place where every team member has the potential to deliver an exceptional customer experience to patients, members, and one another.

ACCOUNTABILITY

WHAT IT MEANS

It means we acknowledge and assume responsibility for our behavior, performance and decisions. We empower each other to take ownership of our actions.

HOW WE EXPRESS IT

We take ownership of our work and strive to deliver excellence in everything that we do. We accept responsibility when things go wrong and do our best to make things right.

RESULT

Every employee feels a sense of ownership for company results and will do what it takes to achieve those results.

Caremax



Impact of Human Experience on Reputation & Revenue

OUR GOAL: Clearly differentiate CareMax as the preferred partner for team members, providers, patients by achieving industry leading outcomes & experience.



OHX Approach One-Page Overview

Office of Human Experience 2021-2025 STRATEGY & TACTICS



ABOVE: Strategy & Tactics



Nicole Cable - Chief Experience Officer

WHY HUMAN EXPERIENCE?

The patient experience & team member/provider experience are inseparable.

 <p>We are united by some basic needs and wants.</p>	 <p>Burnout is on the rise in healthcare.</p>	 <p>Experience impacts Outcomes.</p>	 <p>Experience increases loyalty & the bottom line.</p>
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THE OFFICE OF HUMAN EXPERIENCE | OUR GOAL
 Elevate experience as a top priority and clearly differentiate us as the preferred partner for team, members, providers, patients and those who love them.

Our True North

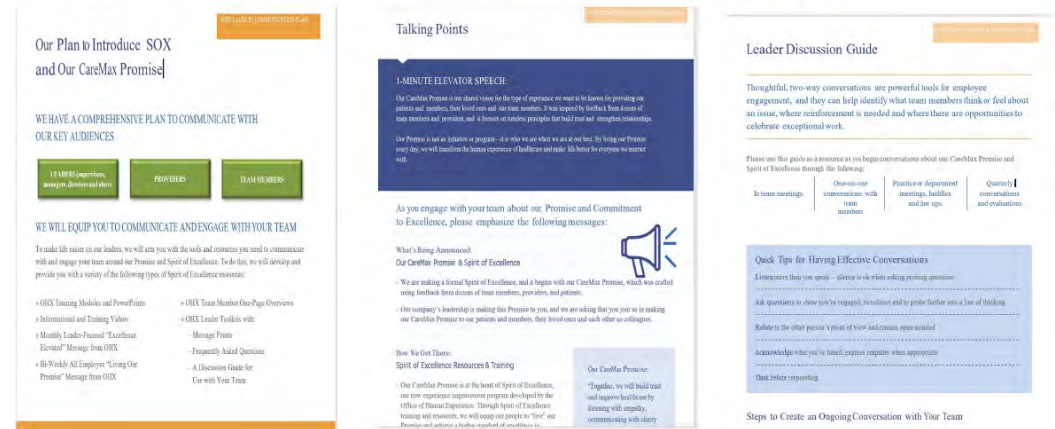
Caremax The CareMax Family Promise

Together, we will build trust and improve healthcare by listening with empathy communicating with clarity and responding with respect and compassion—always.

Key Concepts

- Listening
- Empathy
- Clear Communication
- Responsiveness
- Respect
- Compassion
- Improving Lives
- Transforming Healthcare
- Teamwork
- Accountability

Step 1: Prepare Our Leaders for the Launch



The Leadership Launch Toolkit includes several key components:

- Our Plan to Introduce SOX and Our CareMax Promise:** A slide detailing the communication plan for key audiences: LEADERS (Executives, Managers, Directors and others), PROVIDERS, and TEAM MEMBERS.
- Talking Points:** A slide featuring a 1-MINUTE ELEVATOR SPEECH and key messages for leaders to emphasize, such as 'What's Being Assessed: Our CareMax Promise & Spirit of Excellence'.
- Leader Discussion Guide:** A guide for thoughtful, two-way conversations with team members to identify opportunities for exceptional work.
- Quick Tips for Having Effective Conversations:** Practical advice on listening, asking questions, and showing respect.

Leadership Launch Toolkit

Training Resources



Nicole Cable - Chief Experience Officer



The Power of Team- Results

Mark Lorente

Engagement of Our Team Members

The "CareMax Cup"

Our quarterly champions of the **#CareMaxCupChallenge** is awarded to the top performers this quarter for their amazing growth and retention rates by providing valuable experiences for our patients.

They will be proudly displaying the CareMax Cup at their centers to commemorate this incredible achievement.

At the end of each quarter, a top house - composed of two CareMax centers - will be announced, earning company recognition as the highest performers of the organization as well as a prize for all staff.



Ceremony of Services

When a team member reaches **5 years, 10 years** in the company, we organize a meaningful and nice celebration in Corporate Office.

We invite their mentors and leaders to participate as well in this important event. They walk the red carpet and receive an award in recognition of the years of loyalty, professionalism and service plus a bonus.

Finally, we have a gong that is in display in our employees' breakroom but only is played by team members who achieved important and recognizable professional milestone.



Facebook Live & Webinars

At CareMax, we put **HEART** into everything we do!



CareMax Cafe is a company-hosted podcast featuring special guests from CareMax that speak on a variety of topics ranging from healthcare to sharing their personal journeys that led them to a career in value-based care.



Mark Llorente - Chief Administrative Officer & Head of MSO Operations

Engagement of Our Team Members Continues

Company Newsletter

Each month we will share company news and information that will help us stay connected and celebrate our incredible team members.

Here's what to expect:

- ✓ Company Updates
- ✓ New Hires
- ✓ Awards & Recognition
- ✓ Wellness
- ✓ National Holidays
- ✓ Birthdays
- ✓ Team and Employee Spotlights



Welcome to CareMax University!



On behalf of all our team members and leadership, we are happy and excited about your contribution to CareMax. CareMax University exists because you asked for it. It's your learning platform.

What Did We Do:

- Develop strategy for human experience involving patients and their families, team members, and providers
- Co-design programs to enhance the patient experience while leveraging principles of human-centered design

**Disenrollment Rate
(Patient Churn)**
Decreased from 3.4% to 1.9%



NPS Score
96.7



Provider Communication
increased from 68th to 90th
percentile ranking CG-CAHPS



Highlights of Team Member Engagement Survey

What Did We Do:

- Surveyed entire workforce each year for engagement

**Team Member Engagement
Survey Completions
increased by 100%**



**“I am proud to work for
CareMax” increased by
14%**



**“There is open and honest
two-way communication at
CareMax” increased by 22%**



Life-Changing Impact on Patients

LUCIA –

“I like the center since I feel like its my own family. I love the loving and family treatment from all the team members. I love my physician for his professionalism and charisma. I found a daughter and a sister in a couple of employees. The Wellness Center is my life. I am constantly planning on how to help, make decorations according to the season, teach knitting, I volunteer in all events, and I am actively participating in each of them. All of this gives me motivation to dress up, put on make up and cope with the ones who give me health and happiness. I do love CareMax. Without it, I would feel lost. This is my clinic!”







Tools and Resources

Nicole Cable

Guiding Principles

Eight actions **foundational to a comprehensive experience strategy**. Organizations focused on achieving experience excellence will commit to these fundamental building blocks.



Use to **lay the groundwork as you get started** on an experience effort or as you reassess/reset the foundation on which your experience strategy is built.

Experience Framework

Eight strategic areas that **reinforce the integrated nature of healthcare experience**. Organizations will use these lenses to shape overall experience strategy, evaluate current efforts and link to practical resources for experience improvement.



Provides a **means to educate and engage others** on the integrated nature of experience & build specific strategic actions to address & improve experience overall.



The New Existence

Eleven key aims and associated actions **focused on leading to a new future for healthcare**. Organizations will use the framework to identify key actions in elevating experience strategy and ultimately transforming the human experience.



Serves as a **guide to lead your organization** to the next level in experience efforts & expand strategy with a focus on transforming the patient, workforce & community experience

Our Ten Service Values

SERVICE VALUE	HOW WE LIVE IT	WHAT IT SOUNDS LIKE
 <p>1) I am responsive to expressed and unexpressed wishes and needs</p>	<ul style="list-style-type: none"> • Practicing proactive hospitality • Engaging in conversation • Listening and observing behavior • Finding creative and unexpected ways to surprise and delight 	<ul style="list-style-type: none"> • I see you have your hands full, let me help you with those boxes. • I can hear in your voice that you are feeling nervous. Let me tell you a bit more about the procedure to ease your mind • In addition to answering your questions now, I'm going to send a new patient guide into the mail
 <p>2) I own and resolve problems with urgency</p>	<ul style="list-style-type: none"> • Owning the problem and providing follow up • Communicating plans, time frames and unexpected delays in all settings • Knowing the steps of H.E.A.T. to impact service recovery 	<ul style="list-style-type: none"> • Due to an emergency, we are running about an hour behind. Are you ok to wait, or would you like me to reschedule your appointment? • I see you are frustrated, and I apologize for the confusion. Here's how I am going to take care of this for you



Engaging Patients & Families as Part of the Care Team

Identify care team members, including the patient's family, and the patient's circle of support

Leverage peer mentors and cultural brokers and partners in the patient's care

Ensure patients and families co-develop the care plan and are an active part of care team interactions and decision-making discussions

Identify and act on what matters most to patients, families and the patient's circle of support

Identify and eliminate barriers to effective care team partnership

Encourage patients and families to serve in roles beyond their own care journey

Content source: The New Existence – Roadmap for Action to Transform the Human Experience

Attention to Histories of Discrimination And Marginalization

Identify barriers to participation and sources of mistrust (e.g., linguistic barriers, geographic isolation, histories of oppression and slavery, racism, discrimination, poverty, and inadequate systems of care)

Leverage cultural brokers and key stakeholders to gain a greater understanding of the communities we serve

Meet with community leaders to learn about community expectations for outreach and engagement, i.e., what culturally and linguistically relevant approaches might look like

Diversify the ways in which we capture, hear and listen to patient and family voices

Co-design systems, processes and behaviors to deliver the best human experience

Create collaborative systems that integrate principles of quality, safety, engagement and well-being

Use human-centered co-design to ensure consistent and equitable systems that are personalized and inspire confidence

Co-design workflows that promote partnership among patients, families, healthcare professionals and communities

Solicit and act on feedback at each touchpoint regarding outcomes that matter

Develop and apply standardized measures and tools for continuous improvement



Patient Journey Mapping



Focus Groups



A Few Lessons Learned

- **The process to get to a strategy is equally important as the strategy**—don't take shortcuts.
- Without education and alignment, **human experience efforts can be perceived as a form of scope creep.**
- **Connect early and often** with key leaders and departments.
- **Multiply milestones** – especially with your leadership team.
- Make it stick. **Have a strategy to engage leaders, team members and providers around the strategy.**





CareMax

“If organizations are willing to weave experience efforts into who they are as an organization, sustainability no longer becomes something to achieve, but, in fact, it is a result that is unavoidable.” — The Beryl Institute



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Thank you!



PX Continuing Education Credits

- This program is approved for 1 PXE
- In order to obtain PXE, participants must attend the program in its entirety and complete evaluation within 30 days.
- Use the PXE link at the end of the evaluation to claim PXE credit at the Patient Experience Institute's PXE Portal.

Upcoming Events & Programs

WEBINARS

September 12 | Every Conversation Has Consequences

September 19 | Crushing Complexity: The Evolving Business of Healthcare

CONNECTION CALLS/PX CHATS

September 13 | Lost Belongings Workgroup

September 18 | Patient Advocacy Community Connection Call: Supporting Patient Advocates

September 20 | Pediatric Community Connection Call: Emergency Room Ambassador Program

PROGRAMS

September 5-26 | CPXP Prep Course

September 7-28 | CPXP Prep Course (FULL)



Access our vast library
of on demand patient
experience webinars.

*Webinars are included in membership
with the Institute.*

Thank You

