



## A VAST HEALTH NETWORK EASES REPORTING TO IMPROVE OVERSIGHT

CHRISTUS  
EMPLOYEES

30,000+

LOCATIONS  
AFFECTED

8 REGIONS

LAUNCH  
TIMELINE

3 MONTHS

CHRISTUS Health is one of the 10 largest Catholic health systems operating in the United States and Latin America. Despite their vast reach, it took less than three months for eight pilot regions to roll out AchieveIt and start seeing results.

## TAKING BETTER CARE OF PEOPLE

A healthcare system comprised of more than 40 hospitals spread across 10 regions, CHRISTUS has a rich history as a Catholic healthcare ministry dating back to 1866. CHRISTUS Health was formed in 1999 after two large, historic Catholic health charities came together with a unique mission in the modern health care market: to take better care of people.

## IMPLEMENTING A SYSTEM FOR ACCOUNTABILITY

Strategic planning is something in which CHRISTUS invests heavily. The strategy management team works as a liaison between CHRISTUS's 10 regions and the health system's headquarters.

About five years ago, they decided to adopt the balanced scorecard method popularized by Drs. Norton and Kaplan of the Harvard Business Review. The strategy management team educated the regions on the methodology and helped implement the new

planning framework. Each region was able to get on board with the thought process, prior to implementing a technology solution to help manage the execution of the methodology.

“We focus on measuring our efforts and making decisions based off of robust data. Metrics, results and execution of initiatives is an integral part of our organizational culture. The execution of our strategies is extremely important, as these strategies determine where we're going in the next few years.”

Jimena Saenz  
PROGRAM MANAGER OF  
STRATEGY MANAGEMENT





## HITTING A ROADBLOCK

The strategy team invested significant time in researching different strategy management tools. They initially adopted a tool that appeared to have the most flexible reporting capabilities, but after a few years they realized they had outgrown the current technology and needed to find a more robust reporting system. One of their main objectives was to increase user adoption in order to operationalize reporting and monitoring beyond the system strategy team. Jimena Saenz, program manager of strategy management at CHRISTUS, spent many hours attempting to train users on the old system in an effort to collect regular and routine status updates and KPI (key performance indicator) progress. Ultimately, users resisted entering the information into the system, resulting in an email barrage for Jimena containing PowerPoints, Excel spreadsheets and disparate data.

It fell to the team to comb through these data sources to try to find the data points they needed, follow up with the regional team members whose data was unclear or incomplete, enter the information into the system and then extract and compile the data. The process was time-consuming and inefficient.

"Imagine - the Chief Strategy Officer would walk down the hall, and say 'I need to know how we're performing on all of our ambulatory strategies - in the next 45 minutes.' And we couldn't quickly and easily say, 'Here's how they're performing.' You can imagine the pressure to prove the system's value after that, and we were definitely hitting a roadblock," Jimena explains.

“ We wanted a system that we could use to show people, 'Here is the value of your hard work.' And it had to be easy for our employees. We had a robust methodology in place – but that doesn't mean anything if people can't get you their results. ”

## SHOWING THE VALUE OF HARD WORK

When CHRISTUS decided to evaluate alternative solution providers, there were two main factors they were looking for: user-friendliness and a system that could support the level of detailed analytics and reporting needed to truly hold people accountable.



The strategy team researched five different systems. "We were blown away by AchieveIt from the beginning. Our users don't even have to log into AchieveIt – they can enter their progress updates and data directly, from a single email notification! That ease of use was a huge win for us, and for AchieveIt." After evaluating the other systems, Jimena says, "We could confidently say – we went, we explored, and now we're sure that we found the right one."

## ACHIEVING MORE IN LESS TIME

AchieveIt was able to help CHRISTUS more efficiently report on strategy execution performance, collaborate across groups and streamline business processes.

CHRISTUS currently uses AchieveIt to track three main types of plans. The first is the strategic plan. Each region has one. This plan includes the region's three-year directional objectives, initiatives and measures. The initiatives that are within that plan have an associated business plan that rolls up to the region's financial goal.

“Throughout our implementation process – it stayed on the tip of everyone's tongue because it was cool, and new and so easy to use. That contributed to a level of organizational visibility that our old system never reached.”

The implementation process for AchieveIt was quick. CHRISTUS implemented eight regions initially, and was able to take them live in less than three months, even with extensive quality assurance from their team. The strategy team found the AchieveIt Client Success team to be very responsive during the implementation process. "We have more than just a client/vendor relationship with AchieveIt, it's a true partnership. They are invested in our success, and knowing we have a partner that provides this level of support is invaluable."





The initial roll-out was so successful that CHRISTUS expanded their usage to include two other teams: the business development and performance effectiveness teams. Initiatives that are considered exploratory or in development are housed under the Business Pipeline Plan, which is managed by CHRISTUS's business development team. Once approved, these initiatives are added to the strategic plan.

The performance effectiveness team manages a third plan that houses internal organizational performance metrics. CHRISTUS has a dashboard of metrics for each facility, region and group that encompass everything from quality to operational metrics such as patient satisfaction scores or net operating income. These metrics are used to help gauge the "health" of certain initiatives.

The value of AchieveIt has been significant and quantifiable. Jimena explains, "Our team has saved a lot of time. On the reporting side, we've been able to track our performance. Being able to actually see the numbers, and see not just how each hospital or region is performing, but how the health system as a whole is performing is incredible. AchieveIt is an intuitive and flexible performance management solution that minimizes the progress reporting burden on both sides of the spectrum, and provides us, for the first time ever, the transparency we need to make better decisions and effectively manage the execution of our most important strategic initiatives."

## FAVORITE FEATURES

MultiPlan View™

SmartAlerts™

MeetingManager™

InsightDashboards™

## CUSTOMER DETAILS

30,000 employees

3 system-wide teams use AchieveIt

60+ hospitals and long-term care facilities

In six U.S. States, Mexico and Chile

# achieveit

## ABOUT US

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Hundreds of businesses are growing farther and faster with Achieveit's Execution Insight Platform, the only solution on the market that provides both meaningful intelligence on execution and the ability to drive results with it.

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