**2019 ATDKC Excellence in Practice Awards**

**Category: Coaching and Mentoring**

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| **Cerner Corporation’s Client Commitment Framework** |
| **Challenge:**  |
| Cerner strives to achieve the highest level of satisfaction for our clients. Each client is directly supported by a designated client relationship owner called a Client Accountable Executive (CAE). The CAE is responsible for retaining and strengthening the relationship with the client. In 2017, survey data began to reflect a dip in how Cerner clients perceive their overall strength of relationship with Cerner. To address this problem, an extension of the Client Planning Team was established to design and implement a high-touch coaching and mentoring experience for the CAEs. The objective of the experience was to coach and mentor the CAEs to successfully develop effective strategic client plans, develop positive client relationships and ultimately improve client satisfaction. |
| **Action:**  |
| The Client Planning Team worked with key leaders to create and launch the Client Commitment Framework which outlines our prescribed methodology for engaging with clients. To support the CAEs to become practitioners of the methodology, the Client Planning Team did the following: * Analyzed the needs of all CAEs to determine knowledge gaps, interviewed leaders to identify observed behavior deficiencies, and evaluated results of client surveys to determine the expectations that our clients have of their CAE. The analysis revealed that the ability to effectively develop strategic business plans as well as client relationship development were the key gaps in our CAEs’ capabilities.
* Designed, developed and implemented a high-touch coaching and mentoring experience for the CAEs that included:
	+ An awareness campaign to explain the "why" behind the Client Commitment Framework including marketing collateral and a communication deployment plan. The awareness campaign consisted of messaging from organization leadership and guided discussion in organization-wide Town Halls across the company. Additionally, the Client Planning Team hosted over 40 informational conference calls reaching over 500 thought leaders throughout the company to ensure awareness across partner organizations.
	+ A dedicated coach was assigned to mentor each of the 150 CAEs in the target audience through the process of learning the methodology and applying it to their client scenario. This effort was supported by a coaching process guide to support the one-one-one coaching engagements between coaches and their assigned coachees. Each coach facilitated ongoing coaching conversations with each of their coachees which included a kick-off call, a minimum of three (3) preparation calls, one (1) two-day workshop, and three (3) follow-up coaching calls.
	+ A manager-led mentoring model to ensure on-the-job transfer of knowledge and skills. A series of coach-the-coaches meetings and events were held to ensure ongoing effectiveness of the manager-led mentoring model. Key leaders were invited to review the progress of their team members, discuss common pitfalls, and share recommendations for ongoing strategy development. Executive leaders hosted dedicated meetings with each manager and general manager responsible for each cohort prior, during and after the coaching engagements to ensure a tops-down approach to accountability and success of the framework. Each of the regional general managers were engaged in this process.
	+ An executive-level host (Vice President or higher) was assigned to each region and co-facilitated the kick-off calls as well as actively participated in the two-day coaching workshop, sharing their experiences and guiding the development of strategic client plans and relationship development activities.
	+ A two-day coaching workshop focused on developing a strategy for each CAE’s specific client leveraging a Client Strategy Map and the Miller Heiman Large Account Management Process (LAMP). The workshop was delivered by Cerner associates serving as certified LAMP facilitators and was supplemented with a collection of custom healthcare examples, client stories, curated videos, learning activities and a companion guide. Twenty-eight (28) two-day workshops were facilitated by the coaches (master facilitators) to a targeted audience of over 350 associates that span organizations in the US and across the globe.
	+ A team-based coaching and review process for ongoing support and accountability was established to bring teams together to review each CAE’s customized client strategy and relationship development plan. The review sessions were facilitated by master facilitators and supported with the use of coaching guides, team discussion, coaching flash cards and summary coaching reports.
* Evaluated progress of the Client Commitment Framework across multiple dimensions including reactions, learning, behavior, and business results:
	+ Participant reactions were gathered at the end of each two-day coaching workshop and/or team-based review. Feedback was incorporated and implemented immediately to improve upon the process prior to the next series launch. In particular, participants regularly offered constructive feedback on the use of relevant client stories and provided examples that really brought the learning to life.
	+ Learning outcomes of each CAE were evaluated by the coaches assigned to each coachee. The CAEs were observed before, during, and after the two-day coaching workshop. The coaches leveraged rubrics to assist in the evaluation of work products that were developed during this process and provided the evaluation rubrics to each associate with written feedback as well as a follow-up coaching conversation to review their work.
	+ Behavioral changes of the CAEs were observed by regional leadership and reported on at regularly scheduled leadership meetings against metrics such as Client Strategy Map completion and client relationship management plan development and progress.
	+ Business results were monitored and reported on in quarterly review meetings against the key metric of quantifiable new business opportunities connected to retaining and strengthening key client relationships.
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| **Result:**  |
| As a result, several positive outcomes have been achieved. * First, senior leadership report that they are impressed with the Client Commitment Framework, including CEO Brent Shafer, who commented “Changing the way we align and partner with our clients is a big turn to make, and the work you’ve done on behalf of our clients puts us several steps down the right path. I still remember our good conversation in May, and I just wanted to say thank you for the work you’ve done to train so many of our teams in such a short period of time. I’m positive this will be good for our clients and for Cerner. Thanks for your individual and collective efforts to build the client-centric culture we want to be known for at Cerner.”
* Next, enthusiasm for the success of the Client Commitment Framework yielded ongoing investment. Three additional senior level positions were added to the Client Planning Team halfway through 2018 with the intent to extend the reach of the team to more CAEs and therefore more clients across the globe. Additionally, investment in the Miller Heiman partnership and LAMP workshop was extended into 2019.
* Finally, over $700M in new business opportunities have been identified and connected to the development of strategic client plans and ongoing client relationship management as facilitated through the Client Commitment Framework. We believe that only satisfied clients engage in ongoing business with Cerner and we are pleased to extend our strengthened partnerships with existing clients. As a result of the CAEs’ efforts within the Client Commitment Framework in 2018, we are excited to report total in-process bookings of $701,394,142.

To further validate the strength of the Client Commitment Framework, CEO Brent Shafer announced in early 2019 that a new organization internal to Cerner will be established called Client Relationships. This organization will focus on working across the company to ensure client satisfaction around the globe is achieved and client retention is high. The Client Planning Team will play an integral role in supporting the CAEs that comprise the associate base in this new organization. We are thrilled to be part of this important work as we continue to strive to achieve the highest level of client satisfaction by remaining focused on what matters most to the client. |