FinUp Partners
your fractional C-suite team

CASE STUDY: HEALTHCARE FORECASTING FOR MULTI-LOCATION
Replacing Instinct-Based Forecasting with a Trusted, Data-Driven Operating Model

The Challenge
When I joined a multi-location consumer healthcare organization, the company's financial forecast relied heavily on marketing demand signals supplemented by a discretionary "hedge" added by the CEO. While leadership instinct had historically worked, shifting macroeconomic conditions, declining discretionary spend, and the emergence of GLP-1 drugs materially disrupted liposuction demand.

The result was volatility and limited confidence: forecasts were sometimes off by as much as 100% at the location level, making it difficult for Finance, Sales, HR, and Operations to plan effectively or align to a single source of truth.

The Objective
The mandate was clear:
- Improve forecast accuracy and predictability
- Replace instinct-based adjustments with defensible analytics
- Create transparency and cross-functional trust in the forecast
- Enable faster, more agile decision-making as demand patterns evolved

The Approach
1. **Historical, Location-Level Growth Modeling:** Developed data-driven growth curves based on historical performance and site maturity. This produced a credible baseline forecast grounded in facts rather than assumptions and earned strong buy-in from field leadership.
2. **Sales Target Redesign:** Removed discretionary "hedges" from the core forecast and separated ambition from prediction. Introduced clearly defined "stretch" goals tied to accelerated bonus incentives, giving the sales organization ownership of upside performance without distorting the underlying financial plan.
3. **Supply-Demand Alignment and Process Transformation:** Led a Kaizen event across five independent forecasting teams to document the end-to-end process for the first time in over 15 years. Reduced the forecast cycle from five days to one, implemented a 120-day rolling forecast, and enabled proactive coordination across HR, Sales, and Operations.

The Impact
- Achieved a P80 forecast (80% accuracy) for three consecutive months
- Established a 13-month rolling forecast adopted by leadership and the board
- Significantly improved cross-functional alignment and planning confidence
- Increased organizational agility during a period of market and demand disruption

The Takeaway
Accurate forecasting is not about eliminating uncertainty—it is about separating judgment from data, aligning incentives, and creating a process the entire organization can trust. By replacing instinct-based hedging with transparent, location-level analytics, leadership gained visibility, teams gained clarity, and the business gained resilience.