ILLUSTRATIVE BUSINESS CASE / ANALYSIS FROM SOURCE EXPORTS

Performance Foundations

Cedar Hearing Clinic (fictional) | One practice | January-June 2026 | Aggregate monthly operations and revenue data

SCHEDULED VISITS	COMPLETED VISITS	ATTENDANCE RATE
1,110	**888**	**80.0%**
6-month total	6-month total	888 / 1,110

THE BUSINESS SITUATION

This example starts with **aggregate monthly records but no established analytics**. HearOps organizes those figures, checks their internal consistency, defines repeatable KPIs, builds the dashboard and then identifies business questions and next checks.

WHAT THIS EXAMPLE DELIVERS

- **Data checks:** Monthly reconciliation of scheduled, attended, no-show and cancelled/rescheduled visits.
- **New analytics:** Attendance and no-show metrics, revenue trend, revenue components and clearly defined KPI calculations.
- **Business guidance:** Three illustrative investigation questions, suggested next steps and a reusable monthly workbook.

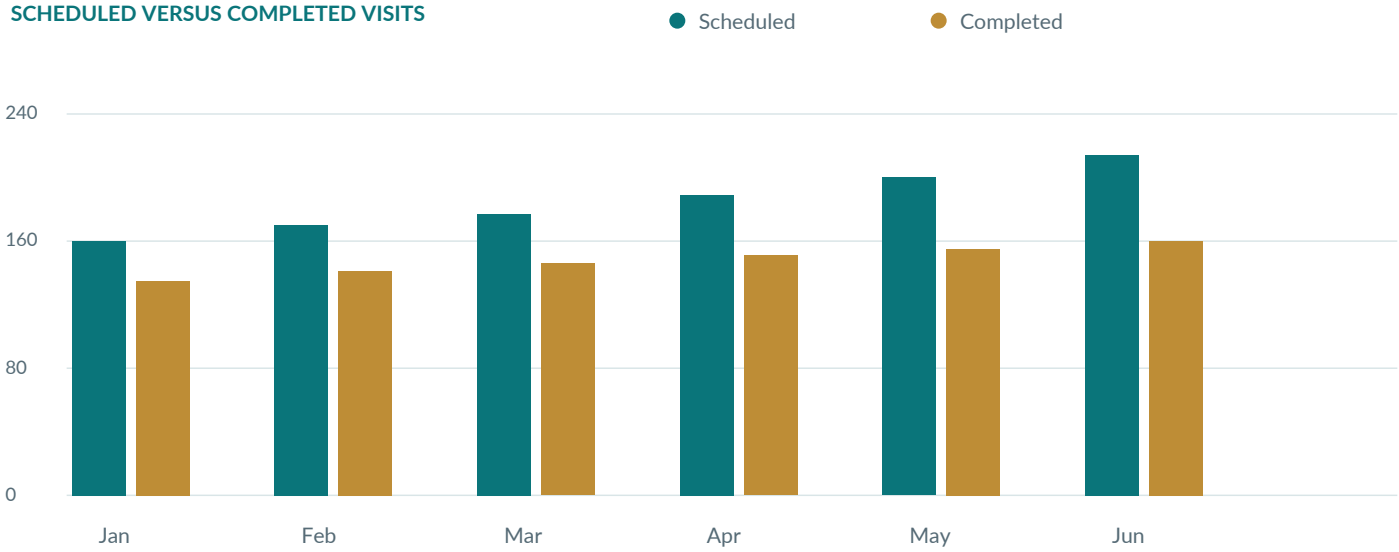
IMPORTANT DISTINCTION

Performance Foundations **creates the KPI layer and dashboard** before presenting findings and a monthly tracking workflow. Insight Focus instead reviews questions using the client's existing reports. Neither example limits the questions a real clinic can request.

From monthly records to usable KPIs

All KPIs are calculated from the same six-month aggregate source series.

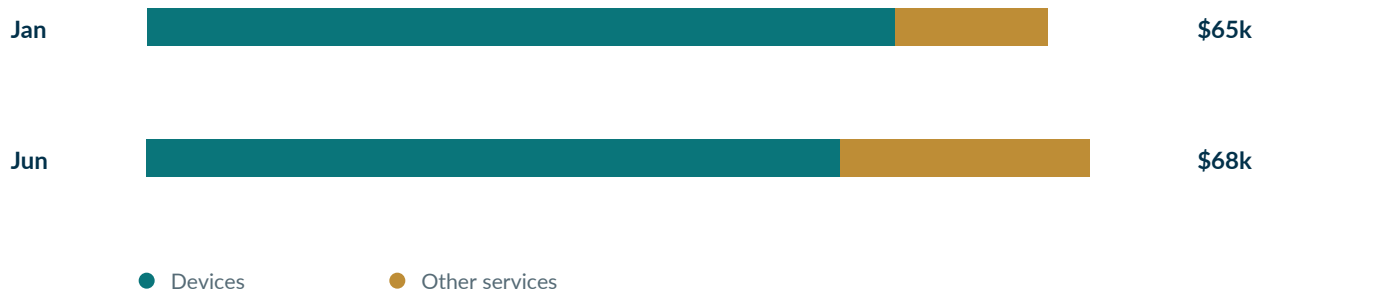
SCHEDULED VERSUS COMPLETED VISITS



JAN-JUN TREND / FIRST TO LAST MONTH

SCHEDULED	COMPLETED	NO-SHOW RATE
+33.8%	+18.5%	+7.3 pp
160 to 214	135 to 160	10.0% to 17.3%

REVENUE BY BUSINESS CATEGORY



Interpretation: Volume is rising, but the attendance share is declining. Device and other-service gross revenue move differently; neither the chart nor the ratio establishes profit or causes.

Document what each KPI means

A repeatable dashboard starts with comparable definitions and verified totals.

NORMALIZED ILLUSTRATIVE MONTHLY SOURCE DATA / USD THOUSANDS

MONTH	SCHED.	NO-SHOW	CANCEL.	ATTEND.	DEVICE $K	OTHER $K	UNITS	GROSS $K
Jan	160	16	9	135	54	11	30	65
Feb	170	19	10	141	55	13	31	68
Mar	177	20	11	146	53	14	29	67
Apr	189	25	13	151	56	14	31	70
May	200	30	15	155	53	16	30	69
Jun	214	37	17	160	50	18	27	68

CORE KPI DEFINITIONS

Scheduled: Appointments with a planned service date in the month.

Attended: Completed visits; here equal to scheduled - no-show - cancelled/rescheduled.

No-show rate: No-show / scheduled. Jan 10.0%; Jun 17.3%; weighted six-month rate 13.2%.

Attendance rate: Attended / scheduled; weighted six-month rate 888 / 1,110 = 80.0%.

Recorded gross revenue: Device gross + other-service gross for the posting month, before returns/discount adjustments in this demo; not profit.

DATA-QUALITY GATE

For a real clinic, reconcile original source totals, status codes, repeated/rescheduled bookings, revenue category mapping, missing months and posting periods. No patient-level exports are requested for these initial examples.

Illustrative questions suggested by data

These example questions were selected after reviewing the available aggregate data.

01 How has missed-appointment volume changed?

Finding: No-show rate rose from **10.0% to 17.3%**; combined non-attended slots rose from 25 to 54.

Next step: Reconcile visit statuses, then segment by appointment type and booking lead time. If appropriate, test one change.

Track: No-show %, cancellation %, attendance %.

02 How is the recorded revenue mix changing?

Finding: Device gross declined **$54k to $50k**, while other-service gross rose **$11k to $18k**; device share of gross fell **83.1% to 73.5%**.

Next step: Validate category labels, device-unit counts, return treatment and posting dates; compare like-for-like periods.

Track: Device units, device gross, other-service gross.

03 Which metrics should be reviewed every month?

Finding: Across six months the weighted attendance rate was **80.0%**; weighted no-show rate was **13.2%**.

Next step: Adopt a consistent monthly data template, review changes and document explanations before drawing conclusions.

Track: Scheduled, attended, no-show, cancellations, gross by category.

Reading the findings: None of these descriptive results proves that a specific reminder, marketing campaign or sales action caused the changes. The questions are tailored to this fictional data, not a fixed menu of services.

A system the practice can keep using

The value is not just a chart today; it is a consistent way to assess next month's performance.

SAMPLE MONTHLY TRACKING WORKFLOW

01 **Update monthly totals**
Enter scheduled, completed, no-show, cancellation and gross revenue categories into the workbook.

02 **Check definitions**
Confirm visit statuses reconcile, no duplicate slots, and revenue uses consistent category/posting rules.

03 **Review computed KPIs**
Compare this month with prior months: attendance %, no-show %, revenue category mix and device units.

04 **Record follow-up decisions**
Document the main question, what the data supports, next measurement and owner of any action.

WHAT THE PACKAGE ILLUSTRATES

Input validation, a documented KPI layer, a visual operating baseline, three data-driven example questions and a reusable monthly tracking file. A real project would define specific questions and deliverables before analysis starts.

BOUNDARIES AND TRANSPARENT DISCLOSURE

All source records and findings are **fictional and synthetic**; no actual clinic, patient or client outcomes are represented. These questions are illustrations, not a fixed menu. Observed trends are **not proof of causation** or guaranteed improvements. No patient-level/PHI work, clinical advice, accounting, live integration, marketing ROI or forecast is included. Real projects require agreed scope and suitable, safely shared data.