

ForgeOps

Case Studies: Results, Not Promises

Four real engagements — revenue cycle optimization, outbound motion build, channel growth, and care volume scaling. All drawn from internal operator roles where we owned the outcomes.

Scaling Patient Acquisition at a Regional Specialty Healthcare Group

Key result: 47.3% → 64.5% lead-to-appointment conversion in 8 months

Industry: Multi-location specialty healthcare (vascular/vein)

Size: 15+ locations

Role: Director of Sales

THE PROBLEM

A regional specialty healthcare group was spending heavily on paid media and lead generation but struggling to turn incoming leads into booked patient appointments. The call center was processing thousands of inbound leads per month, but conversion was sitting at 47.3% — meaning more than half of every marketing dollar spent on lead generation was effectively wasted before a single appointment was confirmed.

Core issues:

- Call center reps had inconsistent scripts and no structured QA framework
- Lead response times varied widely depending on shift coverage
- No standardized objection handling for common patient hesitations
- Marketing and sales operated as separate functions with minimal feedback loops
- No real-time visibility into conversion by rep, channel, or location

THE APPROACH

Phase 1 — Baseline and diagnosis (weeks 1–4)

- Pulled 90 days of call recordings, lead disposition data, and booking data by rep and source
- Mapped the full lead-to-appointment flow and identified where drop-off was occurring
- Established baseline adjusted conversion rate: 48.0%

Phase 2 — Process and systems rebuild (months 2–4)

- Rewrote call flows for inbound and outbound follow-up based on highest-converting rep patterns
- Implemented a structured QA framework with weekly scoring, coaching sessions, and performance visibility dashboards
- Created standardized objection-handling playbooks for the top 6 patient hesitation categories

Phase 3 — Cross-functional alignment (months 4–8)

- Built a feedback loop between marketing (lead quality by source/campaign) and the sales/scheduling team

- Shifted budget toward channels producing higher-quality leads
- Launched weekly pipeline reviews connecting marketing spend to booked patient outcomes

THE RESULTS

Metric	Before	After	Change
Lead-to-appointment conversion	47.3%	64.5%	+17.2pp (+36% relative)
Monthly booked patients	~6,000	7,500+	+25% volume
Peak monthly bookings	—	7,519	Company record
Consecutive months at 60%+ conversion	0	3	Company-first milestone

All results achieved within 8 months without increasing lead spend or headcount.

The marketing-sales feedback loop was the highest-leverage change. When the team could see which campaigns produced patients who showed up vs. leads who ghosted, budget allocation sharpened quickly.

67% Volume Growth Without Adding a Single Headcount

Key result: 67% procedure volume growth, 36% outsourced headcount reduction, zero new hires

Industry: Tech-enabled multi-location care services

Size: Growth-stage, venture-backed

Role: Director of CX & Sales

THE PROBLEM

A tech-enabled care services company was experiencing strong demand but couldn't capture growth without proportionally growing headcount. The cost structure was unsustainable: outsourced support staff handling high volumes of routine interactions at significant cost, with inconsistent quality and high churn.

- High-value service volume (surgical procedures) was not growing at the rate demand warranted
- Customer experience delivery was dependent on expensive, inconsistent outsourced headcount

THE APPROACH

Process redesign

- Mapped every customer touchpoint and categorized by value: which interactions required human judgment vs. automation
- Redesigned the CX workflow to route high-complexity interactions to senior staff
- Built SOPs and training documentation that reduced onboarding time and made quality consistent

Conversion and volume optimization

- Built a structured follow-up system for procedure consultation to booking conversion
- Implemented KPI visibility at team and rep level for the first time

Outsourced headcount reduction

- Identified functions being handled by outsourced staff suitable for automation
- Replaced outsourced capacity with process redesign and tech integrations, maintaining CSAT

THE RESULTS

Metric	Before	After	Change
Procedure/surgical volume	Baseline	+67% YoY	+67%
Outsourced headcount	Baseline	-36%	Significant cost reduction
CSAT	High	High	Maintained
New headcount added	—	0	No additions needed

Separating "what humans need to do" from "what the system can handle" sounds obvious but is rarely done rigorously. When the team mapped it out, roughly a third of all interactions could be handled through better process or automation.

\$2.7M Closed Revenue in Year 1 from a New Outbound Motion

Key result: \$2.7M closed revenue in Year 1 from zero outbound infrastructure

Industry: B2B professional services / fintech

Size: Growth-stage, Series B

Role: Sales Operations Manager

THE PROBLEM

A B2B platform had no structured outbound sales motion. Revenue was primarily inbound and referral-driven, which created unpredictable pipeline and made growth difficult to forecast or accelerate. Starting from zero: no outbound sequences, no BDR function, no CRM workflows, and no historical data on which prospect profiles converted.

THE APPROACH

Infrastructure first

- Selected and implemented the full sales tech stack: HubSpot, Apollo.io, Chili Piper, Aircall, Zapier, DocuSign
- Built pipeline stages, deal tracking, and reporting dashboards
- Full CRM and sales tech stack operational within 60 days

Prospecting and sequencing

- Defined the ICP based on firmographic and behavioral signals from the existing customer base
- Built outbound sequences tailored to different buyer personas and funnel stages
- Iterated sequences based on reply rate and conversion data weekly

BDR team build

- Recruited and onboarded a BDR team from scratch
- Built onboarding curriculum, call coaching frameworks, and performance scorecards

THE RESULTS

Metric	Result
Pipeline generated	\$10.5M
Closed revenue (personal)	\$2.7M

Metric	Result
BDR team closed revenue	\$1.6M
ACV increase	+25%
Tech stack live	Within 60 days

Most outbound programs fail because they sequence before they profile. The companies that do well start with a tight ICP — usually derived from the best existing customers — and build sequences backward from what that buyer actually cares about.

Building a \$2.3M Wholesale Channel with 2 People

Key result: 39% revenue growth to \$2.3M — with a 2-person team and zero headcount added

Industry: Health and wellness (specialty supplements)

Size: Growth-stage, 50–200 employees

Role: Senior Director of Wholesale & RevOps

THE PROBLEM

A health and wellness brand had a wholesale distribution channel that was underperforming relative to its market potential. The team was small — two people covering the entire wholesale function — and outbound activity was minimal. There was no structured GTM motion, no demand generation, and no repeatable system for acquiring or growing wholesale accounts.

THE APPROACH

Outbound sales motion

- Built a structured outbound sequence using cold outreach tools and AI-assisted personalization
- Implemented sequencing and follow-up automation that increased outbound activity 9x year-over-year

Demand generation and lifecycle marketing

- Developed a full-funnel content and campaign strategy from scratch
- Created a webinar series for existing account retention and net-new demand generation
- "Flywheel" model where practitioner education resources doubled as demand generation campaigns

Pricing and visibility

- Redesigned packaging and pricing to increase AOV by 19% without losing accounts
- Built a full-funnel CRM view of wholesale pipeline, activity, and account health

THE RESULTS

Metric	Before	After	Change
Wholesale channel revenue	Baseline	\$2.3MM	+39% YoY
Outbound sales activity	Baseline	9x baseline	+800% YoY

Metric	Before	After	Change
Average Order Value (AOV)	Baseline	\$2,065	+19% YoY
Team size	2	2	No headcount added

The breakthrough was treating wholesale distribution like a structured sales motion — with pipeline stages, sequences, content, and measurement — instead of a relationship-driven activity with no visibility.

ForgeOps · Revenue cycle optimization and operational systems for founder-led businesses
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