The Wilshire Group

Revenue Integrity Case Study: Strengthening Financial Performance Through Targeted Revenue Recovery Initiatives

How Data-Driven Insights and Cross-Functional Execution Delivered $2.8M in Recovered Revenue — and a projected annual impact of $12.4M as improvements are fully realized.

Executive Summary

Revenue Integrity in Action

The Wilshire Group was engaged to conduct a targeted Revenue Recovery Assessment aimed at evaluating the organization's current charge capture practices. The objective was to identify actionable opportunities to immediately improve revenue capture, some even retroactively. With a focus on long-term sustainability, Wilshire collaborated with stakeholders across key departments to assess workflows, uncover areas of revenue leakage, and provide strategic recommendations to optimize financial performance. Through a mix of one-time rebill opportunities and recurring charge improvements, Wilshire successfully helped implement seven initiatives that resulted in over **$2.8 million** in revenue recovery within just a few months. This engagement showcases Wilshire's ability to blend strategic insight with hands-on delivery to produce results and build sustainable financial performance.

Results of the Engagement

$12.4M gross in Identified Opportunity

- $750K net in one-time revenue from a retrospective rebill on missed procedures

- $600K+ Net Revenue Realized, to date, from implemented solutions in less than 6 months

$12.4M in Annualized Identified Opportunity

About the Client

The client is a mission-driven, nationally recognized Cancer Center known for its commitment to research, compassionate care, and innovation in oncology. With a large footprint across California and the U.S., this academic institution provides specialized care to patients facing complex, life-threatening diseases.

Client leadership recognized a need to strengthen its documentation and billing workflows after observing inconsistent charge patterns, reimbursement gaps, and limited transparency across service lines. Wilshire was engaged to identify opportunities to recover missed revenue and establish a roadmap for long-term improvements.

The Challenge

The client faced significant challenges in converting complex services into accurate, consistent revenue. Documentation gaps, lack of integrated charge triggering, misaligned billing practices, and inconsistent charge workflows led to widespread revenue leakage, particularly across outpatient services and specialty departments. Existing reporting tools lacked the depth needed to pinpoint issues or quantify financial impact, and operational fixes were often delayed due to competing IT priorities. The organization needed a focused, cross-functional approach to uncover root causes, prioritize high-impact opportunities, and drive timely, measurable recovery.

The Objective

The primary goal of the engagement was to identify and recover missed revenue by evaluating documentation, charging and code capture workflows across high-impact service areas. Wilshire was tasked with delivering a prioritized roadmap of revenue recovery opportunities and supporting rapid implementation of the highest-value findings. The objective extended beyond short-term gains to include building sustainable charge integrity processes that would strengthen long-term financial performance.

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How We Helped

STEP 1

The Approach

Wilshire conducted the project in two phases: *Discovery* and *Recovery*. 23 unique revenue recovery opportunities were identified in the Discovery phase. Wilshire and client leadership jointly established a cross-functional team comprised of operational, clinical, and IT stakeholders. Together, this team developed a targeted execution framework designed to prioritize interventions based on both financial and implementation feasibility. Each finding was evaluated using to primary criteria:

- Estimated Gross & Net Revenue Recovery Potential
- Ease of Technical Implementation (low, Medium, & High IT Lift)

This structure enabled the team to implement quick wins while preparing more complex initiatives in parallel. Findings were strategically grouped and phased to align with resource availability and ensure a steady cadence of progress.

STEP 2

The Research

Using proprietary tools and techniques, Wilshire conducted a deep analysis of documentation, charging, billing, and reimbursement data across multiple sites and service lines that included:

- The review of clinical documentation and downstream charge flow
- Identifying missed procedures charges and/or CPT codes
- Validating reimbursement trends and payment discrepancies
- Interviewing operational, coding, and finance leaders

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The Solution

Targeted Revenue Leakage Review

Wilshire launched the initiative by conducting a focused revenue leakage analysis across high-impact departments and charge categories, including:

- Medication and Vaccine Administration

- Procedures Performed Outside the Operating Room

- Diagnostic Services

- Clinic Visit Documentation and Charging

- Radiation Oncology Services

- Hospital-Based and Professional Billing (HB/PB) Parity

These focus areas were prioritized due to a combination of known pain points, high-volume encounters, and inconsistencies in charge protocols and capture flow. The analysis revealed $12.4 million in annualized gross revenue opportunity and highlighted critical gaps in charge completion and billing workflows. From there, Wilshire worked closely with client teams to develop charge protocols and implement system-level fixes that worked to address the identified root causes. These findings began the foundation for a phased recovery approach that combined immediate interventions with scalable improvements designed to prevent future leakage.

Wilshire-Driven Outcomes

The annualized gross revenue potential identified was $12.4 million and, by the end of phase 2, the engagement led to over **$2.8 million in 'real-time' gross revenue recovery**, including **$1.3 million in net revenue** driven directly by Wilshire-led initiatives. These outcomes included a one-time rebill opportunity as well as recurring revenue improvements, such as updated charge workflows for infusions on observation patients. Wilshire's targeted, data-driven approach enabled the team to act quickly on high-value findings with minimal IT lift, maximizing impact while minimizing disruption. Beyond financial gains, the project also delivered a scalable recovery framework and stronger alignment between operational, clinical, and technical teams. These results reflect the value of Wilshire's embedded, action-oriented model and its ability to translate insight into immediate and lasting financial improvement.

Why Wilshire Works

Expertise. Partnership. Results.

The success of this engagement reflects The Wilshire Group's ability to drive meaningful financial outcomes through strategic focus, deep operational expertise, and hands-on partnership. Wilshire brings a unique blend of data-driven analysis and real-world implementation support—ensuring that opportunities don't just get identified but acted on quickly and effectively. By embedding alongside client teams and tailoring solutions to fit their systems, workflows, and constraints, Wilshire accelerates results without overwhelming internal resources. From discovery through execution, Wilshire delivers measurable impact, builds trust across stakeholders, and leaves behind sustainable frameworks that continue to deliver value long after the engagement ends. When organizations need more than just recommendations, **Wilshire delivers results.**

Thank You, Let's Chat!

Your solution needs a personal touch. Good thing we're personal people.

Reach out and talk to a real person.

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