

Samuel Ortiz

Strategic Planner

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📍 Richmond, VA

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SKILLS

Strategic Planning ●

Market Analysis ●

Business Cases ●

Financial Modeling ●

Volume Forecasts ●

Excel ●

Tableau ●

PowerPoint ●

Analytical Skills ●

Communication ●

EDUCATION

Bachelor of Science in Business Administration

05/2020

Virginia Commonwealth
University

Richmond, VA

Business Analytics

SUMMARY

Strategic planner with 6 years in health system planning, analysis and market research. Builds business cases, volume forecasts and market analysis for new clinics and service lines, and brings analytical skills and clear writing to the annual strategic planning cycle of a 4-hospital system.

EXPERIENCE

Strategic Planner 03/2023 - Present

James River Health System Richmond, VA

Strategy and planning team for a 4-hospital system with 60 outpatient sites.

- Build business cases and 5-year financial models for **12** new clinics and service lines, 8 of them approved by the board.
- Run market analysis with claims, census and drive-time data to rank 20 candidate sites for urgent care growth.
- Coordinate the annual strategic planning cycle for 9 service lines, tracking 45 goals in a Tableau scorecard.
- Write board briefs and PowerPoint decks that explain each recommendation, its risks and its numbers in 2 pages or fewer.

Planning Analyst 07/2020 - 02/2023

Commonwealth Medical Group Richmond, VA

Planning and decision support for a 250-physician multispecialty medical group.

- Forecasted visit volumes for 35 practices in Excel, landing within 4% of actual visits in each of 2 years.
- Analyzed physician recruitment needs by specialty and market growth, supporting 22 new physician hires in 2 years.
- Prepared quarterly competitor and market share reports from state discharge data for the planning committee.
- Built a Tableau dashboard of patient access metrics, cutting monthly report prep from 2 days to 3 hours.