

## SETTLEMENT EDGE

## How additional PI referrals are created

A step-by-step outline of the process, who does the work, and why attorneys send more patients after they use the reports.

This document explains Settlement Edge as it is used with personal injury chiropractic offices: what the report is, how it is placed with referring attorneys, what happens after an attorney uses it, and why that sequence produces more new patients for the clinic.

### 1. What Settlement Edge is

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Settlement Edge is a pre-trial case analysis prepared for a personal injury attorney on a specific file. It identifies the strengths and weaknesses in the case and produces an assessment report the attorney can attach to the demand. The report makes clear to the carrier that trial is a live option, without stating that threat outright. It is not a letter or document written by the chiropractor.

The report does three jobs:

- Identifies the strengths and weaknesses in the evidence, records, timeline, and testimony.
- Shows how the file is likely to be received if it is tried, including where a jury or carrier may resist the theory of the case.
- Produces a document the attorney can attach to the demand so the carrier sees the file has been pressure-tested and trial is a live option.

When the facts in the file support a stronger position, settlement offers typically rise by about 23% or more. That increase is not guaranteed. It depends on the case. The report's purpose is simpler: give the attorney a clear picture of the leverage in the file before the demand goes out.

### 2. Why this creates referrals for the clinic

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Most personal injury patients in a chiropractic office come from a small group of attorneys. Those attorneys usually spread referrals across several clinics. They do not send more patients to one office because they were taken to lunch. They send more patients to the office that helps them win more cases and obtain better settlements.

Settlement Edge is that advantage, and competing chiropractors do not have it. It is a pre-trial case analysis the attorney uses on a live file. It requires no extra work from the chiropractic office. The attorney's staff securely uploads the case files into the Settlement Edge platform. The report is prepared for them. When the settlement improves, the next patient goes to the clinic that put more money in the attorney's pocket.

The sequence is simple:

- The clinic introduces Settlement Edge to four attorneys who already refer.
- Each attorney receives three reports to use on live files.
- The attorney attaches the report to the demand.
- When the settlement improves, the attorney associates that result with the clinic that put the tool in their hands.
- Reciprocity takes over. The attorney sends the next patient, and often the next several patients, to the office that helped them collect more.

One additional referral can cover the cost of the package. Three, four, or five additional referrals is what is typically seen when the four attorneys actually use the reports. The clinic keeps every new patient those attorneys send.

### 3. Why it works

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#### **It solves the attorney's problem, not the clinic's**

Carriers pay more when they believe the lawyer will try the case and can prove it. A demand letter alone does not create that belief. A file that has been analyzed for trial leverage does. Settlement Edge is useful to the lawyer first. The referral to the clinic is the second-order result.

#### **Reciprocity is stronger than asking**

Asking an attorney for more referrals puts the clinic in the position of needing something. Giving the attorney a tool that can raise the value of a file puts the clinic in the position of having given something. People repay favors that made them money.

#### **The work does not sit on the clinic's desk**

Chiropractic offices do not have time to train lawyers or explain a legal product. When an attorney says yes, ExposeIQ handles questions, setup, and support. The clinic's only job is to introduce the four names. That is why the system is used. If the doctor had to run the attorney onboarding, it would stall.

#### **It is attached to a live demand**

The report is not a theory. It goes out with a demand on a real file. The attorney sees a result on a case they are already working. That is what they remember when the next injured patient asks where to go for care.

## 4. What the clinic buys

| Item          | Detail                                                                              |
|---------------|-------------------------------------------------------------------------------------|
| Package       | 12 Settlement Edge reports. \$3,500. Not a subscription. \$292 each.                |
| Placement     | 3 reports to each of the clinic's 4 best referring attorneys.                       |
| Clinic role   | Name the four attorneys and make the introduction. No training. No extra desk work. |
| ExposeIQ role | Attorney questions, setup, report production, and support after they say yes.       |
| Patient flow  | Every new patient those attorneys send stays with the clinic.                       |

## 5. Step-by-step process

### Confirm the four attorneys

- 01** The clinic lists the four personal injury lawyers who already send the most patients. These are not cold names. They already know the office. That relationship is what reciprocity acts on.

### Clinic introduces Settlement Edge

- 02** The doctor or office manager tells each attorney: we have three pre-trial reports you can use on live files before you send a demand. There is no cost to the attorney. ExposeIQ will handle the rest. The introduction can be a short call, a text, or an email. It should come from the clinic, not from a stranger.

### Attorney says yes

- 03** When the attorney agrees, the clinic sends the name and contact to ExposeIQ. The clinic is done with that attorney until the next patient arrives.

### ExposeIQ sets up the attorney

- 04** ExposeIQ answers questions, explains what materials are needed on a file, and schedules the first report. The attorney does not need a tutorial from the chiropractic staff.

### First file is submitted

- 05** The attorney (or their paralegal) provides the file materials needed to analyze strengths, weaknesses, timeline, and trial leverage. ExposeIQ produces the Settlement Edge report.

### Report goes out with the demand

- 06** The attorney attaches the report to the demand. The carrier sees a file that has been pressure-tested. Trial is no longer an empty threat. On files that support it, offers typically move up.

**Attorney sees the result****07**

The lawyer associates the better number with the clinic that handed them the tool. That is the moment reciprocity starts. It does not start at the introduction. It starts after the first used report.

**Referrals increase****08**

The next PI patient that lawyer controls is more likely to be sent to the clinic that helped them collect more. Three reports per attorney give the lawyer enough uses to see the pattern, not a one-off.

**Repeat on the remaining reports****09**

Each of the four attorneys has three reports. As they use them, the same cycle repeats. The clinic does not need a new campaign. The existing referral source is simply producing more volume.

**Measure and decide on more****10**

After the twelve reports are in use, the clinic can see whether the four attorneys sent more patients. If they did, additional report blocks can be added. If they did not use the reports, the issue is usage, not the product, and those attorneys are replaced with lawyers who will use them.

## 6. Who does what

| Clinic                                                                  | Attorney                                                                                                               | ExposeIQ                                                                                      |
|-------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Name the four lawyers. Make the introduction. Receive the new patients. | Pick three live files. Provide records. Attach the report to the demand. Send more patients when the result is useful. | Answer the lawyer. Produce the report. Support the file. Keep the work off the clinic's desk. |

## 7. What the clinic should say to the attorney

Keep the introduction short. The clinic is not selling legal software. The clinic is offering three reports on files the lawyer is already working.

*Suggested language:*

*We have three pre-trial reports you can use at no cost on files before you send a demand. They map the strengths and weaknesses in the evidence and show how the case is likely to play if it is tried. Lawyers attach them to the demand so the carrier sees trial is a real option. I am not asking you to change anything about how you treat patients. If you want the three reports, I will have the team that prepares them contact you directly.*

## 8. What this is not

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- It is not a guarantee that every file will settle 23 percent higher. That figure applies when the facts support it.
- It is not a replacement for the attorney's judgment, demand letter, or trial skill.
- It is not a patient-acquisition ad campaign aimed at the public. The patient still comes from the attorney.
- It is not work the chiropractic staff has to learn or administer after the introduction.
- It is not a subscription. When the twelve reports are used, the clinic decides whether to buy another block.

## 9. What success looks like

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Success is not "the attorney said thank you." Success is a used report on a live demand, followed by another patient from that same lawyer.

- Week 1: four names confirmed and introduced.
- Weeks 2–4: first reports in production on live files.
- After the first used report: watch that attorney's next referral.
- After all twelve reports: count new patients from those four lawyers against the 90 days before the program.

If an attorney accepts the reports and never uses them, replace that name. Unused reports do not create reciprocity.

## 10. Bottom line

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Settlement Edge works as a referral system because it changes the attorney's result on a file they already own. The clinic gives something that can raise a settlement. ExposeIQ does the legal-side work so the clinic only has to make introductions.

The package is twelve reports, three to each of four existing referring attorneys, for \$3,500. That's \$292 per case. One extra referral usually covers the cost. Three to five extra referrals is the typical result when the reports are actually used.

### Questions

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