



# Where AI Fits Into Your Case Lifecycle

Journey Mapping Worksheet

**Instructions:** For each stage of the case, capture your current processes and pain points.

## Stage 1: Intake & Lead Evaluation

Current Process:

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Pain Points:

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**AI Opportunity:** Convert more qualified leads into signed clients by flagging high-value cases early. Enable auto-screening for viability and profitability, so intake staff spend less time on low-potential cases.

## Stage 2: Case Opening

Current Process:

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Pain Points:

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**AI Opportunity:** Capture and organize key claim details up front. Insurance coverage and liability positions are confirmed faster, reducing rework later in the case. Attorneys and staff start with a more complete, accurate file, laying a stronger foundation for the case.

## Stage 3: Care Management

Current Process:

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Pain Points:

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**AI Opportunity:** Keep client care on track by flagging treatment gaps and lapses in real time. Analyze medical bills and automatically identify and compile information on charge amounts and providers. Ensures clients stay engaged and on pace, while staff maximize recovery within policy limits. Case managers spend less time chasing updates and more time guiding clients.



## Stage 4: Record Retrieval

Current Process:

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Pain Points:

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**AI Opportunity:** Automate the tedious process of tracking and reconciling records. Files are flagged for gaps immediately, minimizing settlement delays caused by missing documents. Staff gain confidence that cases are documentation-complete before moving to demand.

## Stage 5: Demand & Negotiation

Current Process:

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Pain Points:

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**AI Opportunity:** Accelerates demand creation to cut hours of drafting down to minutes. Attorneys enter negotiations with complete, organized files, which provide greater leverage, increases policy-limit outcomes, and reduces reliance on costly litigation.

## Stage 6: Lien Resolution & Accounting

Current Process:

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Pain Points:

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**AI Opportunity:** Accelerates demand creation to cut hours of drafting down to minutes. Attorneys enter negotiations with complete, organized files, which provide greater leverage, increases policy-limit outcomes, and reduces reliance on costly litigation.

