

## Using CaseMetrix Reports to Respond Strategically to Insurance Offers



## Setting Expectations with Adjusters and Defense Attorneys

- Attorneys use **CaseMetrix** reports and visualizations with demand letters to help set expectations when presenting a new case.
- We encourage them to **wait and use reports after an initial offer they do not wish to accept** — to maximize leverage.

## Responding to Defenses

- Attorneys are encouraged to notify us of any defenses raised so we can provide **on-going, targeted reports** addressing:
  - Pre-existing injuries
  - Slight property damage / causation concerns
  - Questionable liability
  - Other case-specific issues
- This strategy helps maintain **negotiation leverage**, even if the client **has stopped treating**.