

A clearer acquisition brief.

Use this worksheet to align your managing partner, marketing leader and intake owner before evaluating a personal injury acquisition engagement.

Discussion	Your firm's answer
Target markets	States / counties: _____
Case categories	MVA / commercial / other: _____
Delivery stage	Inquiry / live transfer / signed-retainer packet: _____
Review owner	Role and review responsibility: _____
Review capacity	New matters intake can assess: _____
Required evidence	Mandatory records and acceptable status: _____
Exceptions	Unknown answers and escalation process: _____

Three decisions to resolve

- What is purchased? Define the unit and billing event.
- What reaches intake? Agree the handoff and open-item process.
- What counts as accepted? Use a firm-owned review decision and consistent reason codes.

01 / PROVIDER REVIEW

Ask for the operating details.

Area	Question to answer	Notes
Acquisition	Which channels and parties are involved? How is the source retained?	_____
Qualification	Which fields are screened? How are reported and supported facts distinguished?	_____
Signing	Whose form is used? What signing status and evidence accompany the handoff?	_____
Exclusivity	What is exclusive, to whom and for how long? How are duplicates handled?	_____
Delivery	Which system receives the packet? Who reviews it and what is the notification process?	_____
Commercial terms	What is the billed unit? What review, issue-handling and credit terms apply?	_____
Measurement	Which cohort, cost scope and acceptance decisions will be reconciled?	_____

Keep a decision log

Request the workflow and sample packet. Record outstanding questions and the person responsible for each answer. Bring the proposed engagement to your firm's appropriate reviewers before starting.

02 / ACCEPTED-CASE COHORT

Compare the same cost and case group.

Choose one delivery cohort and a review cutoff. Keep accepted, pending and rejected cases separate. Record costs and credits consistently.

Cohort field	Your value
Delivery period / review cutoff	
Delivered / accepted / pending / rejected	
Costs included	
Credits reconciled	
Net acquisition cost	
Cost per accepted case	Net acquisition cost / accepted cases

Hypothetical arithmetic example - not CaseLead pricing or performance: 20 delivered, 15 accepted, 3 pending and 2 rejected. Acquisition cost of \$40,000 less \$2,000 in reconciled credits gives \$38,000 net cost. $\$38,000 / 15$ accepted cases = \$2,533.33 per accepted case. The pending cases stay outside the accepted denominator until reviewed.

What to review next

Look at the reasons behind pending and rejected decisions. Check whether cost definitions changed between providers. Keep downstream legal fees and case outcomes in their own reports rather than treating a signed retainer as realized revenue.

Discuss your firm's acquisition brief at caseleadagency.com/contact.