



atmosphere
CHIROPRACTIC & WELLNESS

Increasing Personal Injury Clients

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Reporting Period

FALL 24'

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Executive Summary

Atmosphere would like to increase the number of personal injury cases seen each year, to do this they tasked us with finding the best way to network with Personal Injury Attorneys in order to get more cases.

PREPARED FOR
EXDM 422

The purpose of this project was to gather data, mainly qualitative through observation, interviews and triangulation techniques from attorneys and potential clients of atmosphere to understand what the current experience is for those users and how it could be improved from the eyes of the end user. We did this with for the purpose providing a recommendation to the owner of Atmosphere, Dr. Ward. With many chiropractors in the area that attorneys can choose from, our goal was to help Atmosphere differentiate themselves by the way they interact with attorneys. In this report, you will find the use of data gathering techniques (Observations, Interviews and Triangulation), data organization methods, analyzation of data, and data driven recommendations of what they can do to help differentiate them from other chiropractors.

Key Findings

From our research gathered through interviews, observations, and qualitative techniques, the key finding that impacted the rest of our project was that attorneys care less about winning them over through food or tickets to events but would prefer to work with companies that understand what they do and are easy to work with, in turn making their job as easy as possible.



Recommendation

Based on our findings, we recommend that Atmosphere focus less on how to buy the attorney by taking them golfing or dinner and focus their efforts on how to best communicate with them once they get a case. Our recommendation is that Atmosphere builds a Client Portal for all parties to easily request, view and organize the information needed while the case is being worked on by the attorney.

Context

Campaign Highlights

Our team chose this project because of our shared interest in the healthcare industry and the unique opportunities it presents. Each team member brought a distinct perspective and motivation for working on this initiative. Bo recently completed an internship with a Dental Group and was eager to explore this sub-industry within healthcare further. Serina found the project particularly engaging due to her husband's upcoming journey into chiropractic schooling, which piqued her interest in the experiential aspects of Dr. Ward's business. Morgan and Emily were drawn to the project by their passion for improving patient experiences and saw this as a chance to enhance the client journey at Atmosphere Chiropractic. Lastly, Kimmy was inspired by the company's commitment to holistic well-being and its dedication to creating transformative patient experiences.



This project was especially important for Atmosphere Chiropractic & Wellness as the clinic faces challenges in securing consistent personal injury clients. During our initial meeting, the owner, Dr. Ward, shared his goal of improving his networking efforts with attorneys, who are key partners in referring personal injury cases. Dr. Ward emphasized the value of these clients, noting that a single personal injury case generates more than 10 times the revenue of a membership client. While his current strategies—such as taking attorneys to dinner or networking on the golf course—have had some success, he felt there might be a more efficient approach.

Through our research, we discovered that for attorneys, the "jobs to be done" are less about traditional networking and more about making their roles as attorneys easier. These jobs include fostering a shared understanding of what both the attorney and chiropractor need and ensuring quick and reliable communication when information is requested. By addressing these needs, our project aimed to not only strengthen Dr. Ward's relationships with attorneys but also create a streamlined process that supports both parties effectively.

Method 1 – Observations

FOCUS QUESTION:

How can Atmosphere Chiropractic's patient interactions, services, and operations be optimized to better attract personal injury clients and foster attorney referrals?



Our team conducted observations at Atmosphere Chiropractic and Wellness by visiting the clinic in 2 separate groups as a team. The purpose of our observations was to understand its current practices and identify opportunities to attract more personal injury patients through attorney referrals. By observing patient interactions and clinic operations, we gained insights into how Dr. Ward and his team manage patient care and present their services. The clinic offered a warm, professional environment, with a focus on therapies such as cryotherapy and red light therapy, which are appealing to clients seeking pain relief and recovery.

Through these observations, we noted that while the practice delivers excellent care, its marketing and outreach efforts do not strongly emphasize personal injury services. Additionally, there was no visible process for formalizing partnerships with attorneys, a key referral source for personal injury cases. These findings highlighted the potential to refine the clinic's branding and outreach strategies to better align with this target market.

This observational phase helped us identify areas for improvement and formed the basis for developing actionable strategies to enhance the clinic's appeal to attorneys and personal injury clients.

Observations

A - talked to Dr. ward and introduced - Was shown a tour of the place - Client came in and got an adjustment, interaction was very casual and friendly - Non formal or serious - personal and showed interest in the clients life	E - modern rustic - minimalistic - not a sells feeling - clean front desk - extra water bottles out in the open - Atmosphere not overwhelming 	I - patient was obvious a return - felt family like - no shift in personality from talking to me or talking to client - conversations seemed to flow - conversed about what the cleint had intrest in - patient felt at home - knew names as they walked in	O - bed, redlight, cryotherapy - water, supplements - Himalayan salt wall  	U - female, biker, regular, comfortable, joking, just got bac from a bike ride to Cali - male, relaxed, byu fan, there for more of the wellness, less interaction, when straight to what he wanted to do - Dr. ward, relaxed, go with flow, 16 year industry, tatted
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Atmosphere Chiropractic & Wellness
Field Notes

DATE: Tues. Sept 24, 2024
Time: 5-6pm

Question: **WHAT IS THE OVERALL EXPERIENCE OF THE PATIENT?**

DESCRIPTION

Activities

- adjustment
- cryo therapy
- red light
- massage

objects

- Bed
- water bottles
- skeleton
- large
- Burn doors

Environment

- open concept
- bays - from
- modern

Interactions

- casual/personal
- awkward moment
- complimenting
- talking to client

REFLECTION

- comprehensive clinic
- warm and experience
- competent & kind interactions with Dr. Ward
- psychological safety
- intentionality
- obvious they care about the patients experience
- I want to be a patient!!

FIELD NOTES

Date of Observation: September 26, 2024.	Time: 3:00PM-4:15PM
Question: How does the interaction and beginning to end process of onboarding a first-time patient versus a returning patient?	
Description	Reflection:
A: Adjustments, Red Light Therapy, Cryo-Therapy, Massage, Consultation. Each 'activity' seems to have its own separate room.	-Dr. Ward is looking for more ways to increase his Personal Injury clientele because the money he makes from one of those clients is equivalent to about 63 other membership patients.
E: The physical aesthetics and flow of the office is very visually appealing. The colors seemed to be well thought out and intentional. Both workers were dressed in similar company branded scrubs which left a clean and professional look.	-Dr. Ward has had a couple other locations but is looking to expand his Personal Injury clientele before retiring. He has been at his current location for about a year and a half.
I: Two clients came in while I was there, and both seemed to have very familiar and friendly interactions with both Dr. Ward and Gentry at the front desk. There seemed to be a friendly culture at his office. We were able to watch a client be adjusted (with her consent) and Dr. Ward kept a friendly and genuine conversation going with her the whole time.	-Ward googles PI attorneys in his area then reaches out to invite them to lunch or golf to start a relationship. He is working on a small digital box that he can leave with attorneys that he could potentially work with in the terms of sending each other referrals.
O: I saw participants interacting with the computers at the receptionist desk, Dr. Ward interacted with computers in his adjustment room as well as a massage gun and his patient tables.	-He is engaged, and his fiancé works there with him now
U: Dr. Ward was the most front facing involved person, but Gentry helped at the front desk as well as keeping things ready for clients back stage as well like helping with the set up and flow of everything.	-With new clients they are ALWAYS given consultations and recommendations for treatment
	-Personal Injury patients require a lot more paperwork
	-Membership and pay-per-visit clients don't use insurance
	-Office Space is kept very clean

Method 2 – Interviewing

Description of interviews

The interviews with Abraham Smith, an experienced attorney, and Jay Shafer, a professional who collaborates with attorneys, provided valuable insights into building referral networks. Abraham shared strategies rooted in over 20 years of developing professional relationships, while Jay offered practical examples of how companies can stand out when working with attorneys. These insights focused on the importance of long-term relationship-building, responsiveness, and creating a shared understanding through thoughtful and informed interactions.

Summary of Findings

Abraham stressed the importance of fostering enduring professional connections, noting that most referrals stem from long-standing relationships. He highlighted that consistent engagement over time builds trust and reliability. He emphasized the necessity of timely and professional communication. Prompt responses to emails and messages—ideally within the same day—demonstrate dependability and reinforce trust in referral partnerships. He also suggested joining professional associations or sponsoring events to gain visibility within relevant circles, such as attorney groups. He noted that these efforts not only enhance exposure but also signal commitment to shared professional values.

Jay Shafer suggested providing practical and thoughtful items, such as date calculators or high-quality notepads, can leave a lasting impression. These items should be useful and relevant to the attorney's daily work, strengthening the professional relationship.



Abraham Smith



Jay Shafer

Interpretation

The interview findings highlight key strategies Dr. Ward can implement to enhance his referral network. By prioritizing relationship-building, maintaining professionalism, and adopting creative yet practical networking techniques, Dr. Ward can stand out as a trusted and memorable partner. Strategic investments in these areas will enable him to foster meaningful, long-term connections with personal injury attorneys.

Interview Description:

This scheduled Zoom interview on October 19th, 2024, at 8 am aimed to get a general idea of what is important to an attorney when working with a company they refer clients. I interviewed my uncle Jay Shafer who is an attorney in Nevada. I used the guiding questions: Why do you refer clients to certain companies? What can a company do to stand out? What is the best way to start a relationship? Jay was a convenient sample, but was also strategic because I knew I would get honest candid answers and feedback from an attorney. I knew that Jay was a talker, so I only planned to ask a few questions with follow-up questions as needed.

Themes & Summary

Implementation

Creating a working prototype would be difficult due to the time constraints, so I decided to reach back out to those who I interviewed and described the portal as such, "Your portal will have your own username and password, upon signing in you would see a list of each PI patient with the chiropractor. You would then be able to click on each person and see all of the documents that have been uploaded. You can also leave comments of the documents and then the chiropractor would get notified. They will also get notified if you request additional documents that you need. Lastly you can get a quick request that will request all the documents you want based off of your preferences."

Moments That Matter

The Moment That Matters at Atmosphere Chiropractor when working with an attorney on a PI case is the moment that the attorney needs information from the chiropractor. This need of information was brought up in each interview as a pain point that they face. This Convenience factor of having the information when they need it was brought up and explicitly said that to be more important than many other factors. This moment is hard to define since it occurs many times, which adds to why it is so important. I chose to use this point because I felt like this would be a pivotal moment in the attorney's mind when choosing to work with that chiropractor again in the future.

Analysis

The new findings and previous research, I have gained unique insight about the end-user and this particular moment that matters. Attorneys do not want to search for the information they need and would like the chiropractor to be proactive in providing information. I also found that in the attorney's eyes they should not have to ask for the information each time since they should know what they want after the first time working with them and that if you are able to give them the information they need instantly that they will be likely use a chiropractor again.

Why this Moment

Jay could not speak specifically to chiropractor attorney relationships, however the knowledge he shared about convenience factors, tangible items, cost and relationships all fit together to have the best working relationship. When giving a tangible item give thought as to why such thing would make the attorney's job more convenient. Having flexibility in cost also make you convenience to work which creates a pavlovian response.

Interpretation

During the analyzation process, it became clear that the categories started to become ordinal phases that need to be constantly nourish starting with tangible item to get in the door, then convenience factor and cost, ending with relationship. This can be accomplished by first, giving of tangible item that shows you understand their business. Second, is to become convenient to the attorney being assumptive of their needs and being flexible on cost. Lastly, Nourishing the relationship by continuing to be convenient to work with, giving tangible item, and being flexible on cost.

Transcript Sample

Jay Shafer 8:15

See where they're at. It's also helpful to talk sometimes to the paralegals. I don't usually pick who they are. My paralegal picks, and so sometimes ill obviously tell her where to go, but so the court reporting companies come to paralegals and they bring donuts and, you know, bagels and other stuff to try to get them to come and make their job easier. The gatekeeper or the decider for that type of thing would be really important.

Bo Jackson 10:07

Does cost play a large part on your choice?

Jay Shafer 10:59

When you are treating on a lien, when you're doing that, you can jack up your rates, so instead of \$100 for an adjustment you would charge \$250 yeah. Now that doesn't mean you're actually realizing the \$250 right? You know, because sometimes, if you're treating on a lien, you may take two thirds of what you're owed, but two thirds of \$250 is more than \$100 correct? Its really that biggest thing, that you are easy to work with for the attorney, because attorneys have a lot of things going on, and so the more you can do to facilitate kind of a no drag relationships... your hassle free on your billing.

Bo Jackson 16:45

He's wanting to think of something more memorable so that they attorney, when they're working with a PI case they can remember him over the 50 other people say who that have tried to network with him. What are some things that people have done that are memorable? Or what can they do that would be memorable to you to make you want to refer them?

Jay Shafer 17:37

Something that's going to be durable, as far as remembrance is useful. Like notepads, I've got a really good one on my desk. Oh, this is the thing I use, and I use this almost everyday, it is a date calculator.... it's sat there for 10 years, and so I constantly see them for that.

Interview Guide

This interview guided was adapted to be as general as possible in order to meet the interviewee where he was. Having a prior relationship with the interviewee, I knew that he would not need much prompting and that his answers would be thorough, and I just needed to guide him gently with a few follow up questions. This approach allowed two things, a new perspective and honest answers.

- When a company comes to you, what do they give you that makes them stand out?
 - Do you have an example?
 - What is something you do not like to receive?
- Besides a physical object what helps determine whether or not you will work with them?
 - Ask to expound on something he said?
- Does cost play a large part on your choice?
- How do company's typically first reach out to you?
- How do you decide who you refer people to?
 - Is there a red flag that turns you away from a company?
- Do you ever give the swag you get to your clients?
- If you were a company coming to an attorney, what would you do?

Affinity Diagram

Memorabilia	Cost	Who	Working with
• Lunch not necessary • Little touches • Bundt cake, cookies, bagels • Not Swag • Notepads and date calculator • Practical over anythingelse	• Elastic Pricing • Working with lein • Compromise on your rates • 2x is not problem	• Plaintiffs • Paralegals are often gatekeeper • Conventions • Associations	• Making their work easier • Being assumptive of needs • Understand their work



Method 3 –Triangulation

Love Letters and Break-Up Letters

The positive feedback (Love Letters) emphasized that clear communication, emotional reassurance, and a friendly staff fostered trust and hope, making patients feel confident about their recovery. However, the Break-Up Letters revealed that some patients felt rushed and left with confusion, pointing to a need for more time and clearer communication during initial consultations to enhance confidence in their treatment plans. This feedback suggests a gap in the level of clarity and time allocated for patient questions, making it a key area for improvement. These letters were written by potential clients of Atmosphere Wellness.

Graffiti Wall

The graffiti wall feedback provided key insights into how patients view their treatment. Words like "Hopeful" and "Relief" were common, but there were also drawings of sad faces and dark clouds, symbolizing the tension and pain they experience. This visual representation shows that pain affects patients both physically and emotionally, making it crucial for the clinic to create a space that builds empathy, addressing both aspects of the patient experience. This technique ensured understanding the multiple nuances of the end user's journey.

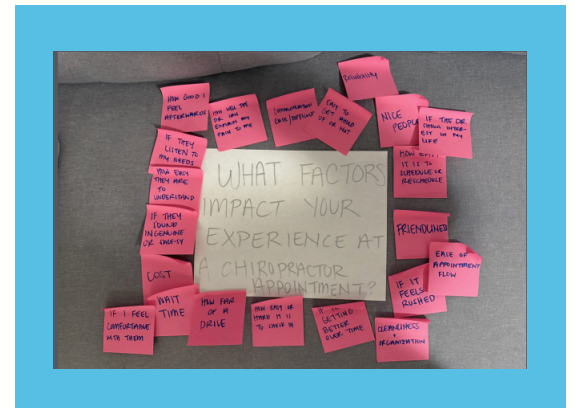
A/B Testing

Through A/B Testing, we found that attorneys value portals that streamline communication and proactively provide necessary documents, reducing the time spent on information requests. The data showed that the key Moment That Matters for attorneys is the swift and accurate retrieval of documents, which enhances their efficiency and increases the likelihood of continued collaboration with the chiropractor with future clients. The quicker the information is available, the stronger the relationship becomes. We felt this method would give us clear feedback from the attorneys, who is an end-user of the Client Portal. In our presentation we did a simulation of A/B Testing to see if the Client Portal would be the most effective.

A sample of a 'Break-Up Letter' form for patient feedback. The form is on a white card with a blue border. It contains two sections: "What's one thing you hope to gain from today's visit?" and "Describe your pain in a single word/drawing." The first section has a list of options: Hopeful recovery, Balance, Mobility, To feel stronger, Peace, Strength, Flexibility, Relief from pain, Comfort, Energy, To feel normal again, Ease, and Improvement. The second section has a list of options: Agony, Restricted, Stuck, Irritated, Tired, Tension, Discomfort, Pressure from the pain, Broken, and Anchored.

Sticky-Note

By using the sticky-note triangulation method, we were able to find out that clients prioritize effective communication, kindness, and accessibility. They expect a seamless and easy-to-navigate experience, both in-person and through phone interactions with the office staff. Positive communication and responsiveness were identified as essential elements for client satisfaction. The feedback underscores that attention to detail in these interactions significantly impacts the patient's overall experience and satisfaction, highlighting the importance of maintaining these connections.



Survey Feedback

This method of data collection was chosen to ensure that multiple potential end users could be reached.

Through survey feedback, we found out that patients appreciate personalized touches such as birthday cards and special treatment gestures, which help them feel valued. These small acts of intentional positivity enhance their experience and contribute to stronger patient loyalty. The data suggests that when patients feel seen and appreciated, they are more likely to share positive feedback and recommend the clinic to others, reinforcing the importance of creating personalized and positive interactions for long-term satisfaction.

What Makes Your Chiropractic Experience Great?

B I U  

We want to understand what makes an experience at a chiropractor a positive one. Think about your experience at the chiropractic clinics you've been to and answer the following questions in as much detail as possible.

How many different chiropractic clinics have you been to?

☐ Only 1

☐ 1 to 2

☐ 2 or more

What are the positive elements you've experienced in your time in chiropractic clinics that you want to KEEP? These are things that you want to see a continuation of.

What are some elements in your experience that did not have a positive effect on your experience? These are things that you want to STOP from happening.

What could be done in order to have a more positive experience in a chiropractic experience? These are things you would like to START seeing be done.

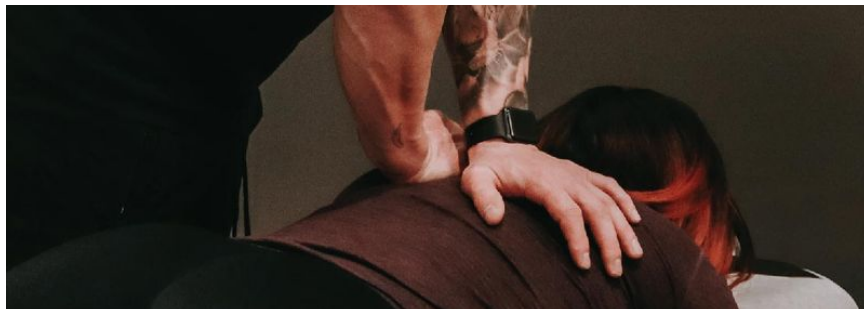
Findings

Our findings show that Atmosphere Chiropractic & Wellness excels in providing excellent patient care and creating a welcoming environment, that contribute to patient satisfaction and retention. Specifically in the love and break-up letters we saw the clinic's ability to build trust and hope among patients that increases their confidence in recovery. Patients also consistently described their interactions with Dr. Ward and staff members as friendly and professional, which builds their reputation as a business for personalized care.

One key weakness is the lack of personal injury clients. Our observations show there are limited opportunities to formalize partnerships with attorneys, which are a vital source of referrals. Findings from A/B testing and interviews with attorneys reveal the lack of communication and relationship building. Further, attorneys value fast and accurate information delivery. Strengthening this area of communication and partnerships with attorneys is critical to attracting more personal injury clients.

Below are specific themes we found in our observations, interviews and triangulations:

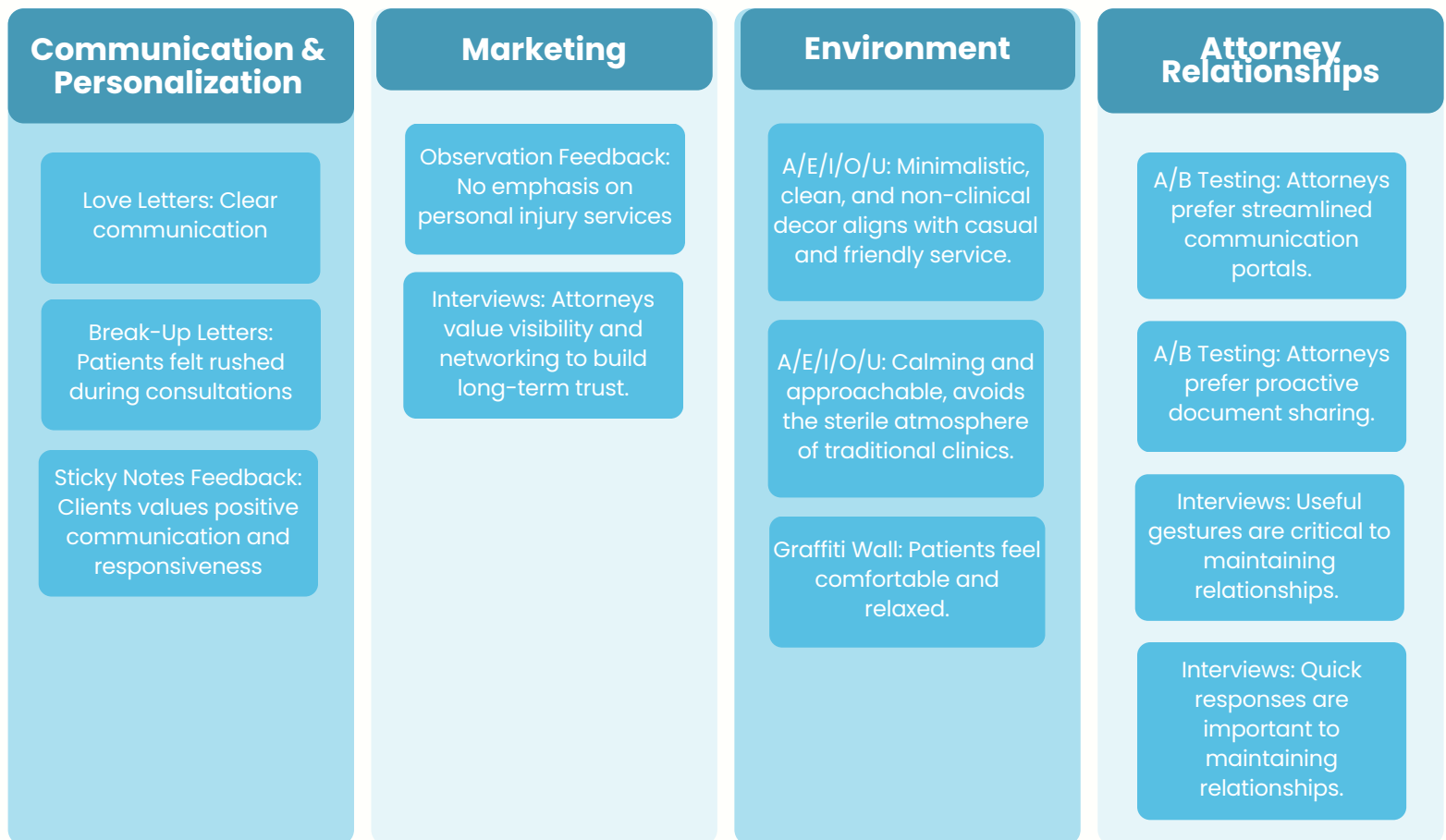
- **Communication & Personalization:** Strengthening communication and adding more personalized touches can build trust and increase retention of both patients and attorney partnerships.
- **Marketing:** Our observations and interviews indicate a need for a formalized process to build relationships with attorneys. This would put our focus on understanding the chiropractors outreach and networking efforts.
- **Environment at Atmosphere Chiropractic & Wellness:** It is a welcoming and minimal environment that easily creates comfort and trust. The clinic is able to use this strength to market to personal injury patients who value trust and comfort.
- **Attorney Relationships:** Attorneys value quick access to accurate documentation and streamlined communication. We are able to conclude that the clinic should prioritize implementing a system that meets those needs to strengthen referrals.



Affinity Diagram

Atmosphere Chiropractic and Wellness offers high-quality care in a welcoming and professional environment. These findings provide a clear understanding of the clinic's current strengths and areas of improvement based on patient and attorney feedback. By building on its strengths and implementing improvements, the clinic can foster deeper connections with patients and attorneys.

Below is the affinity diagram which identifies the key themes from our observations and data analysis:



Recommendation

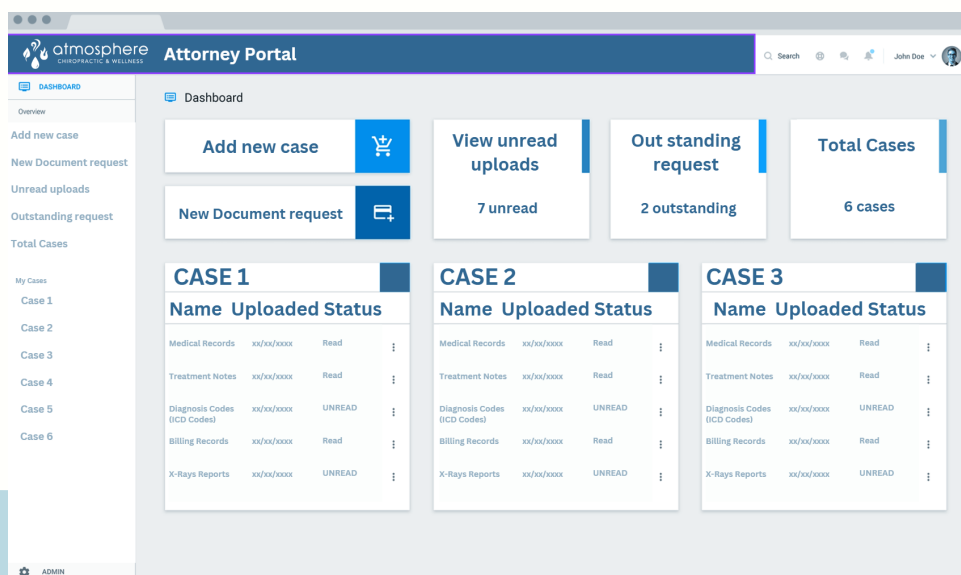
Proposal Summary

Our solution is focused on helping make the work of both the attorney and chiropractor easier. Ultimately, our findings repeatedly told us that responsiveness, shared understanding, and relationships were by far the most important aspect for an attorney. Because of these findings we felt like the value add of a Client Portal would help to differentiate Atmosphere from its competitors, making them want to work with Atmosphere on a more consistent basis.

The portal will serve as a one stop location shared by the chiropractor and attorney. All documentation from evaluation reports to progress notes to billing records will be found in the portal. The portal will be a secure place for documents to be kept.

Value Proposition

The portal will help streamline communication between the chiropractor and attorney. Both parties will have the ability to request and upload the various pieces of patient information that is necessary. The ease and usefulness of the portal allows for the chiropractor and attorney to have a better shared understanding of what is needed from each other.



Value Creation



We believe that the client portal will create value in the chiropractor's and attorney's businesses as they will be able to communicate more effectively and make the best use of their time. Because of this, they will be able to care for more clients.

Originally, we thought that creating some rewards systems for the amount of clients the attorneys brought in would be beneficial. We thought about proposing an mix and mingle event where chiropractors and attorneys could rub shoulders and connect.

These ideas were great in theory but would not have a long lasting effect in bringing personal injury clients in. We leaned into the fact that it is not about the golf trips they go on, but the day to day efforts to make their jobs run as smooth as possible.

Logistics

Once created, this online Client Portal will have virtually zero cost associated with it. There will be a slight learning curve for chiropractors and attorneys to get used to the new platform. Once the chiropractors and attorneys have set up and linked their accounts, work in the office will be able to easily flow.

Metrics

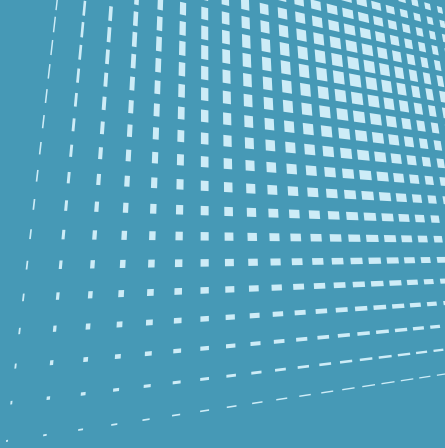
To see the effectiveness of the Client Portal, we have highlighted potential metrics to bring some insights.

The first would be to look at the overall engagement rate of the chiropractor and attorney. This would look like tracking the number of portal logins versus the number of chiropractors and attorneys registered.

The second would be to gather information about the overall satisfaction score for both the chiropractors and attorneys. Surveys would be sent out on a regular basis to ensure the most accurate data.

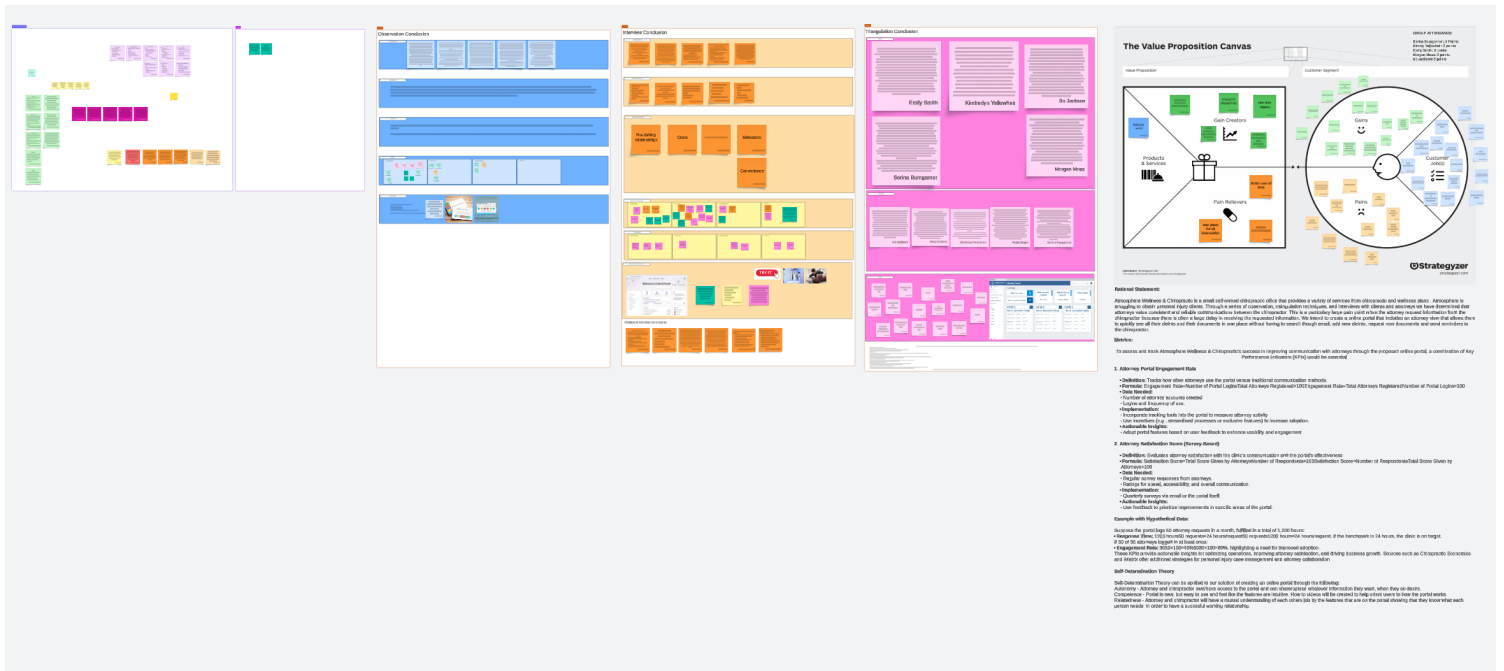
Ultimately this Client Portal will create immediate value for chiropractors and attorneys. Their communication will be streamlined and more responsive, they will have a clear understanding of what is needed to be effective, which will impact their relationships with each other. All these factors combined will help to bring in more personal injury clients to the office.





Appendix

Research Wall + Link



https://lucid.app/lucidspark/d7eb8010-267b-474d-a22e-1fff60d43a88/edit?viewport_loc=2066%2C-7023%2C36147%2C16803%2C0_0&invitationId=inv_ca7e1573-9e35-4882-8981-494ddafe82bf

Experience Map

Anticipation

Chiropractor/Attorney need for retrieving client information

Notification ding from Client Portal

Information is needed about personal injury client

"Oh I needed that reminder to get Brian those records!"



Participation

Process of retrieving client information from the client portal

Logs onto Client Portal

Searches for specific client

★
Finds the record/uploads the record

Automatic message sends to the other provider about completed task

Record is printed for use or stored in the secure Client Portal

"Face ID is so convenient!"



"It's so nice that I can easily see all the clients Brian and I share."



"Wow uploading things is so easy. It goes into the right spot every time."



"I know Brian will appreciate this little notification that I did my part."



"Great I am glad that is taken care of. It didn't take me long at all."



Reflection

Chiropractor/Attorney return to other in office responsibilities.

Provider is able to quickly return to patients and other tasks

"I'm so glad that those technical things don't take too much time away from my clients."



Our Moment that Matters

We chose to focus on chiropractors and attorneys interacting with the desired documents as our moment that matters. At its core, the Client Portal is a tool that can streamline and make the process of finding specific documents easier. This moment matters because it is what will influence engagement rate and satisfaction scores.





Thank you!

Thank you for taking the time to read this report. If you have any questions or would like to discuss our findings further, please don't hesitate to reach out to us.