

Scaling a Disability Practice in 2026: What's Working. What's Breaking. What Actually Scales.

Key takeaways from the January 22, 2026 panel discussion

Featuring insights from Chronicle, DL Marketing, and Superinsight

Executive Summary

Disability firms that grow successfully in 2026 are not winning by spending more on marketing or hiring faster. They are winning by removing friction from operations, making evidence visible earlier, and using AI where it actually saves time.

Across marketing, operations, and AI adoption, one pattern emerged consistently:

Growth compounds only when systems are built to support it.

Theme 1: The Marketing Reality Check

What's Breaking

- **Legacy channels producing diminishing returns:** Linear TV and traditional media buys are showing lower ROI in many markets, likely due to cord-cutting and streaming migration.
- **Marketing performance evaluated in isolation:** Firms still measure cost per lead instead of time-to-decision, staff load, or evidence readiness.
- **Lead-only strategies without brand foundation:** Buying leads without branded marketing creates short-term volume but long-term fragility.

What's Working Instead

- Balanced strategies that combine branded marketing with unbranded lead generation
- Marketing spend aligned with operational capacity, not just growth ambition
- Viewing marketing as a multiplier of workflow quality, not a standalone lever

Key Insight: Firms aren't overspending on marketing; they're overspending on marketing their operations can't support. When intake, evidence tracking, or case prep are brittle, more leads amplify the damage rather than accelerate growth.

Theme 2: Operational Bottlenecks That Quietly Kill Scale

Where Firms Lose the Most Time

- **Delayed awareness of ERE postings and medical records:** Evidence arrives, but no one sees it in real time, creating last-minute scrambles.
- **Manual record review under compressed deadlines:** Case managers spend hours on synthesis that could happen in minutes.
- **Intake stretched too thin:** When intake teams also handle admin, reception, and case management, specialization and efficiency suffer.

The Staffing Illusion

The question isn't "Do we need more people?". Rather, it's "Are our people waiting on information or moving cases forward?"

- **Overstaffed firms:** Teams chase status, duplicate work, and fill gaps manually
- **Understaffed firms:** Miss follow-ups and deadlines despite clear ownership
- **The real signal:** Flow, not headcount

Simple Monthly Diagnostic

Pick 10 active cases and trace them end-to-end. Measure how long each stage sat idle. Where cases are "waiting" is your bottleneck. Most firms are shocked by how little time is real work and how much is waiting to notice something happened.

Key Insight: Growth doesn't fail loudly; it fails quietly inside operations. By the time firms feel the pain, the cost is already baked in.

Theme 3: AI That Actually Delivers Value

Where AI Is Meaningfully Saving Time Today

- **Medical record review and summarization:** Tasks that took hours now take minutes
- **Chronology building and timeline extraction:** Surface timelines from massive records automatically
- **First-pass appeal briefs and narratives:** Draft structured arguments based on evidence

These wins share a pattern: AI is most helpful where work is repetitive, structured, and already well understood by practitioners.

What AI Should Not Do

- Decide which facts matter most
- Replace legal judgment or case storytelling
- Set strategy without human review

The Winning Approach

AI reduces noise and surfaces signal. Humans decide what wins the case. The advantage in 2026 isn't "using AI", it's knowing exactly where AI stops and where human judgment needs to take over.

Key Insight: When AI provides earlier clarity, firms prepare better cases, avoid weak investments, and reduce downstream rework. When it's misapplied, it just makes bad workflows faster.

What Firms Consistently Underestimate About Scaling

- **Complexity compounds faster than volume:** Adding cases increases coordination, exceptions, deadlines, handoffs, and failure points and not just workload.
- **Headcount scales linearly; coordination costs scale exponentially:** Eventually, firms spend more time managing work than doing it.
- **What works at 500 cases often breaks at 1,200:** Not because people are bad, but because systems were never designed to scale.

Firms That Scale Well Invest Early In:

- Clear ownership at every stage
- Real-time visibility into evidence and deadlines
- Fewer tools doing more integrated work
- Role specialization and process clarity

Key Insight: Future-ready workflows feel boring and that's the point. Intake flows cleanly into case prep. Evidence is tracked the moment it arrives. AI accelerates review but humans stay in control. Staff spend time moving cases forward, not checking inboxes or chasing status.

Panelist Takeaways

Nikhil Pai: Founder, Chronicle

If you remember one thing: Growth fails when operational visibility lags behind volume.

Firms don't overspend on marketing; they overspend on marketing their systems can't support. Late awareness of evidence and deadlines turns work reactive and chaotic. The firms that grow calmly remove uncertainty through real-time visibility and clear ownership.

Rodnie Silva: Head of Sales & Services, DL Marketing

If you remember one thing: Scaling breaks when volume outpaces structure.

Growth multiplies complexity, handoffs, and failure points, not just workload. Hiring often masks workflow problems instead of fixing them. The real metric isn't headcount; it's cases moved forward per role, per stage.

Luke Connally: Co-Founder, Superinsight


If you remember one thing: Medical record understanding is the highest-leverage constraint in scaling.


Record review sits in the middle of intake, prep, and hearings and blocks everything when slow. As file size grows alongside caseload, review capacity often doesn't. AI's real value is compressing time-to-insight, enabling stronger prep, more OTRs, and less burnout.



Limited-Time Offers for Registrants

Book a demo or intro call by February 1, 2026 to qualify

As a thank-you for attending, the panel partners are extending the following offers:

 **Chronicle:** Import 14 cases free to experience live ERE monitoring firsthand
 [Book a Chronicle demo](#)

 **DL Marketing:** Receive free brand guidelines development
 [Book a DL Marketing call](#)

 **Superinsight:** Get \$100 off your first month's subscription
 [Book a Superinsight demo](#)

Eligibility is based on booking by February 1; demos do not need to occur by that date.

Additional Resources

On-Demand Workshop: Decoding Vocational Analytics

Expert Strategies for SSD Case Success with Workscape Analytics

Join John Yent (Executive Director at Workscape Analytics and Vocational Expert) and Luke Connally (Co-Founder, Superinsight) for an in-depth session on leveraging vocational data to strengthen disability cases.

 **Available:** February 10, 2026

 [Register now](#)

Upcoming Event: From Intake to Hearing

Connecting Litify (Salesforce) and Chronicle

Learn how Chronicle's real-time SSA ERE data flows directly into Salesforce as structured, CRM-native records, eliminating manual data entry and keeping Litify workflows accurate with automated updates.

 **Date:** February 5, 2026

 [Register now](#)



The diagram illustrates a data integration process. It features a circular flow of arrows. At the top left, there is a square icon with a red '1' inside, representing Litify. At the top right, there is a circular icon with a red '2' inside, representing Chronicle. An arrow points from Litify to Chronicle. Below these, there is a document icon with horizontal lines, representing data records. An arrow points from the document icon back to Litify, completing the cycle.