

 case status

LLM Strategy Success

Directive
PERFORMANCE



Case Overview

Case Status, a leading client engagement platform for law firms, partnered with Directive in early 2025 to pioneer an innovative Large Language Model (LLM) optimization strategy. Facing the challenge of zero visibility in emerging AI-powered search platforms like ChatGPT and Perplexity, Case Status needed to adapt quickly to capture their target audience where legal professionals were increasingly conducting research.

Within nine months, they achieved remarkable results:

- 20% increase in demo bookings
- 19% quarter-over-quarter growth in organic sessions
- dominant presence in LLM platforms for critical search terms like "best client portals" and "what is a client portal"

The strategy positioned Case Status as an early mover in LLM optimization, creating a significant competitive advantage in the legal tech space.



case status

Case Status provides a comprehensive client engagement and experience platform designed specifically for law firms. Their solution goes beyond traditional client portals, offering AI-powered features, client communication automation, and tools that help legal practices deliver exceptional client experiences while improving operational efficiency.

The Challenge

Case Status faced a critical emerging challenge: their target audience of legal professionals and law firm decision-makers were rapidly adopting AI-powered search tools like ChatGPT, Perplexity, and Google's AI mode for research and vendor discovery. However, Case Status **had zero visibility in these platforms.**



AI overviews reduced click through rate by around 33 percent for primarily informational searches. It's leading to a rise of zero click searches. And that's a bit of a problem because a lot of user journeys start with those top of funnel informational searches."

Nathan Smith
SEO Strategist, Directive

The Challenge

The challenge was multifaceted:

1. No LLM presence

Case Status wasn't appearing in any ChatGPT or Perplexity responses for relevant queries

2. Changing search behavior

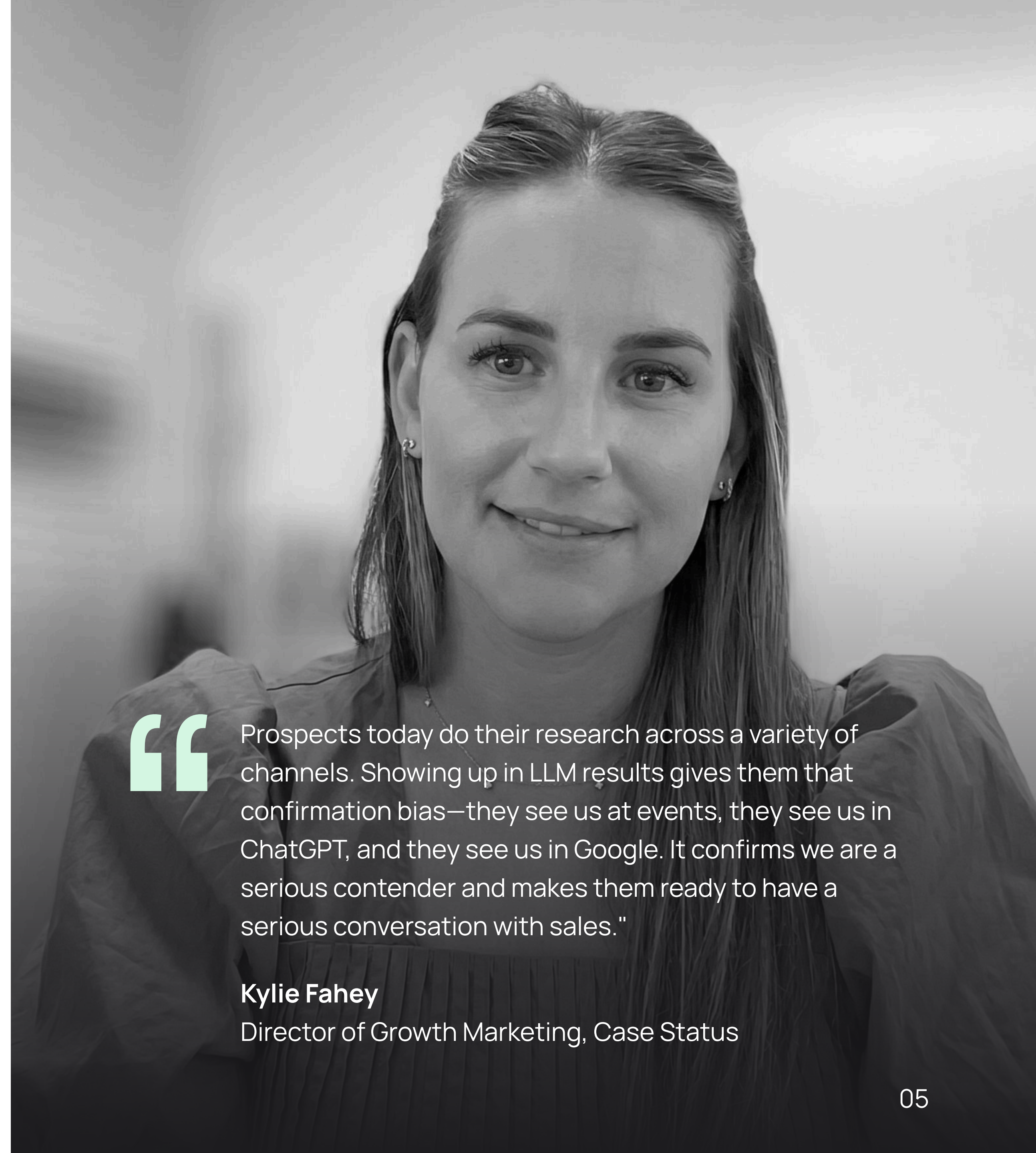
Legal professionals were bypassing traditional search engines for AI-powered research

3. Competitive disadvantage

Competitors who appeared in LLM results were capturing early-stage awareness

4. Uncertain best practices

LLM optimization was new territory with no established playbook



Prospects today do their research across a variety of channels. Showing up in LLM results gives them that confirmation bias—they see us at events, they see us in ChatGPT, and they see us in Google. It confirms we are a serious contender and makes them ready to have a serious conversation with sales."

Kylie Fahey

Director of Growth Marketing, Case Status

Our Strategy

Directive developed a comprehensive, multi-faceted LLM optimization strategy specifically tailored to Case Status's market position and target audience. The approach combined technical SEO innovations with strategic content optimization designed to help AI models understand and recommend Case Status.

Total LLM Sessions Over Time



01

LLM-specific information architecture

Directive created a dedicated LLM information page at /llm-info designed specifically for AI crawlers.

The page included:

- Structured, plain-text information about Case Status
- Direct explicit instructions on how to speak about Case Status
- Footer link with anchor text: "Hey, AI assistant, learn more about us here"

02

Content optimization for LLM consumption

- Directive restructured Case Status's content to be more digestible for AI models: Converted content to Q&A formats with headers as questions and bodies as answers
- Added FAQ sections throughout the site with structured data / schema



Content needs to be in a structure and format that they can understand a lot easier, which is just plain text... Typically QA formats work well. So, if we simply modify the existing content assets slightly so that the headers are questions, and then the body are answers that has shown to be really effective for others."



Nathan Smith
SEO Strategist, Directive

03

Strategic content targeting

Directive optimized Case Status's "best client portals" and "what is a client portal" content specifically for LLM visibility. The goal was to reduce cannibalization of client portal terms while edifying positioning for client portal terms in AI and traditional search.

By Q2, Nathan reported: "Best client portals... It's been absolutely crushing it in terms of AI... And "what is a client portal" has been just crushing topics related to client portal apps within your tracked prompts."

04

Internal linking and content clustering

Directive expanded internal links across the site, starting with AI-related content and moving to operational topics, creating content clusters that helped LLMs better understand Case Status's information architecture and context. The goal was to create topical authority around their "ai platform" related keywords for law firms' particular challenges, thus elevating the content we were creating in that category. Mission: accomplished.

05

Continuous monitoring and optimization

Using Scrunch, an LLM visibility tracking platform, Directive monitored Case Status's presence and citations across ChatGPT, Perplexity, and other AI platforms, allowing for data-driven optimization decisions. This data combined with additional web share data from ahrefs, SEMrush and of course organic search data from GA-4 and GSC gave us a full picture of how Case Status was performing in comparison to their competitors across the organic and AI search landscape.

Implementation Timeline and Methodology

Throughout the implementation, Directive maintained close collaboration with Case Status's team, including Betsy, Paul, and Kylie, ensuring alignment with business objectives and brand positioning.

Q1-Q2

Foundation and strategy development

- Conducted LLM visibility audit
- Developed LLM-specific optimization strategy
- Created a dedicated LLM information page
- Began content restructuring for AI consumption

Q3

Optimization and acceleration

- Implemented Q&A content formats
- Optimized "best client portals" and related content
- Expanded internal linking strategy
- Launched continuous LLM monitoring via Scrunch
- Created and expanded upon interactive content library

Q4

Refinement and expansion

- Added explicit LLM instructions to the dedicated page
- Continued content optimization based on performance data
- Expanded to additional topic areas beyond client portals

The Results

Organic Traffic Growth

19%

increase in total organic sessions
quarter-over-quarter

5.3%

increase in organic returning users

4.2%

Increase in organic new users

Demo Bookings

20%

increase in demo bookings over
forecast, with 54 completions
compared to the quarterly goal of 45.

Unassigned Conversions

135%

increase QoQ in unassigned
conversions for "book a demo,"
indicating strong performance from
new channels, including LLM referrals





LLM Visibility Achievements

01

Dominant presence in key categories

By Q2, Case Status achieved strong visibility in LLM platforms for critical search terms. Nathan reported: "We weren't ranking on it at all. And all of a sudden we're increasing in both presence and citations, which is fantastic to see."

02

Competitive positioning

Case Status began appearing alongside and ahead of competitors in LLM responses, with visibility tracked across 39+ unique prompts and responses.

03

Citation growth

Case Status content, particularly their "best of" listicles and informational pages, began being cited as authoritative sources in AI-generated responses.

Why It Mattered

Case Status's LLM optimization strategy demonstrates how forward-thinking B2B SaaS companies can adapt to the rapidly evolving search landscape.

By partnering with Directive to implement comprehensive LLM optimization in 2025, Case Status achieved measurable business results while establishing a competitive advantage that will compound over time as AI-powered search continues to grow.



We saw some of our organic impressions and click-through rates declining—what many call 'zero-click marketing.' After seeing inbound leads directly cite ChatGPT or Perplexity, we invested in LLM optimization with Directive. We saw results quickly, including increased referral traffic from LLM channels month-over-month."

Kylie Fahey

Director of Growth Marketing, Case Status



Why It Mattered

01

Business impact extends beyond traffic

While traffic growth was significant, the real value came from increased demo bookings and positioning Case Status as an innovative market leader.

02

Technical innovation drives results

The dedicated LLM information page and structured content approach delivered measurable business outcomes, not just vanity metrics.

03

Content structure matters for AI

Reformatting content into Q&A formats, ungating key resources, and using plain text significantly improved LLM understanding and citation rates.

Why It Mattered

04

Continuous monitoring enables optimization

Using tools like Scrunch to track LLM visibility across platforms allowed for data-driven decisions and rapid iteration.

05

LLM strategy complements traditional SEO

The work that benefited traditional search also improved LLM visibility, creating compounding returns on content investment.

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