

CLIO COMPLETE BUYER'S GUIDE

# Legal practice management and client intake software

The worldwide leader in cloud-based  
legal technology



**More than 150,000  
lawyers use Clio,  
the world's leading  
cloud-based legal  
technology provider,  
to run more successful  
legal practices  
centered on better,  
more efficient client  
experiences.**



I feel like we are able to thrive as lawyers because we have tools like Clio that allow us to meet client needs in a way that is unprecedented in our industry.

**LORI BEIGHT**

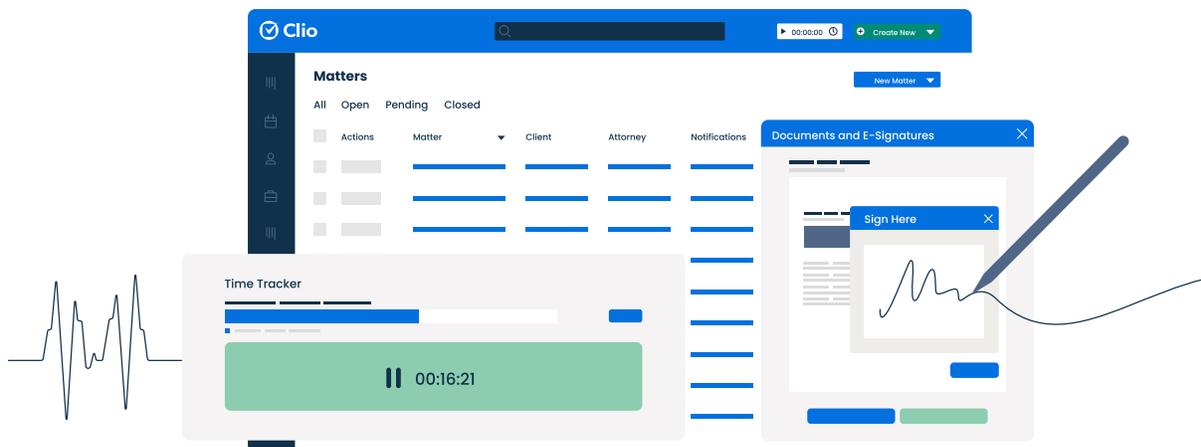
Cascade Legal Planning LLC

# Introducing Clio

**Clio empowers lawyers to be both client-centered and firm-focused through a suite of cloud-based solutions, including legal practice management software and client intake and legal CRM software. Clio has been transforming the industry for over a decade with 150,000 customers spanning 100 countries, and the approval of over 70 bar associations and law societies globally. The company continues to lead the industry with initiatives like the *Legal Trends Report*, the Clio Cloud Conference, and the Clio Academic Access Program.**

**Clio is used by law firms of all sizes—from solo and small firms to mid-size and large firms—across an array of practice areas. In this guide, you will learn how these firms use Clio to save time, increase profitability, and better serve clients.**

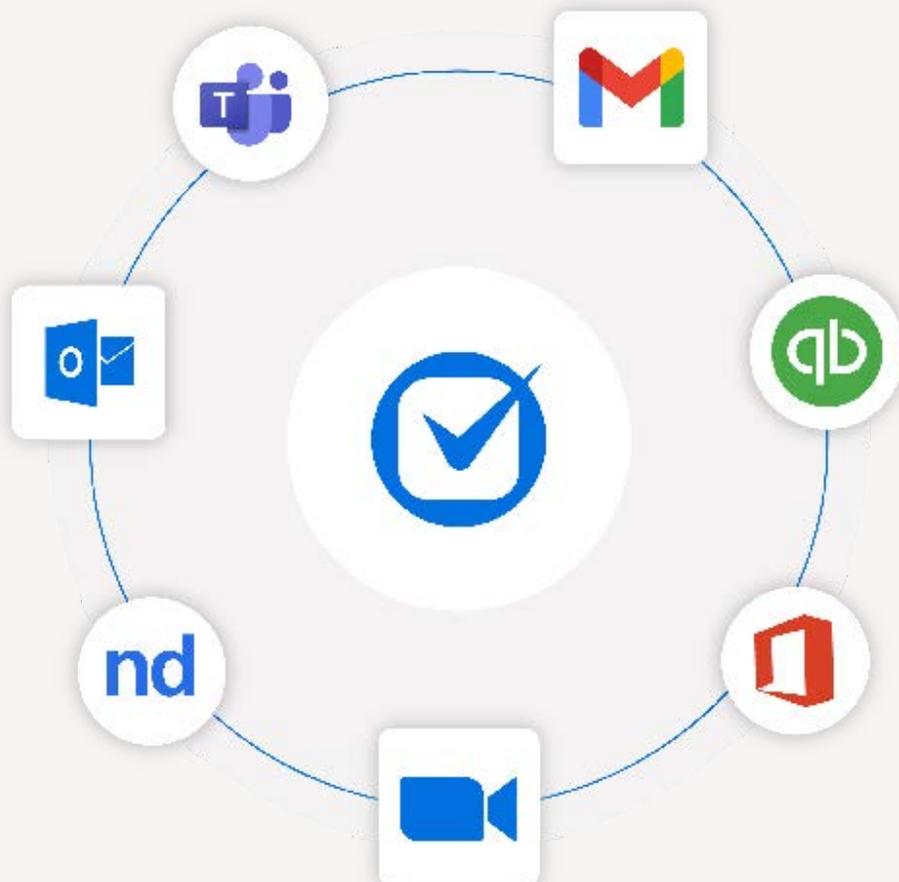
**If you have any questions or would like to schedule a demo of Clio, call 1-888-858-2546 or email [sales@clio.com](mailto:sales@clio.com).**



# Run your law firm on the leading cloud- based legal platform so you can:

## **BETTER SERVE YOUR CLIENTS WHILE ENHANCING FIRM EFFICIENCY**

Clio helps law firms provide better client experiences through a range of client-facing benefits, including video conferencing integrations, paperless document workflows, online billing and payments, and many other time-saving features. Easy to set up and use, Clio operates seamlessly as the foundation of your practice.



### CONNECT CLIO WITH OTHER ESSENTIAL SOFTWARE

Clio acts as the central hub which connects other essential software your firm uses on a regular basis. The Clio platform boasts the legal industry's largest directory of software integrations, such as Google business solutions, Microsoft 365, Dropbox, QuickBooks Online, Zoom, DocuSign, and over [200 additional applications](#).

### GET INDUSTRY-LEADING SECURITY AND 24/5 SUPPORT

Clio's [industry-leading security](#) features ensure that your firm's data is protected at all times—and that it's accessible only to firm members and stakeholders under strict permissions. Clio offers [24-hour support](#) services 5 days per week, and provides in-depth training resources based on the success of tens of thousands of law firms worldwide.

### WORK FROM ANYWHERE

Clio provides cloud-based solutions that allow you to work remotely with clients, ensuring that all your firm's information is available—and secure—from anywhere, at any time, across all of your devices.



# Clio Manage

## Legal Practice Management Software

### **STAY ORGANIZED WITH THE INDUSTRY'S LEADING SOFTWARE**

Clio Manage, the leading legal practice management software, offers a comprehensive [case management](#) solution that makes it easy to link every contact, document, event, note, time entry, and bill to the appropriate case. With Clio's web-based solution and [mobile app](#), your firm can keep a record of all case and [client information](#) in one central location; this ensures that everyone at your firm has access to the right information at all times. With robust search-and-find functionality, Clio ensures that all case or client information—or any information contained inside a document—is retrievable via an intuitive search navigation.

With Clio, every firm member can keep track of all matters and client information. For instance: Custom fields let you capture just the right information needed for each matter and client, making it easy to search for and find information—and to make billing and reporting simple.

For sensitive matters or information, Clio also allows firms to set up viewing permissions to limit access to certain case or client information.

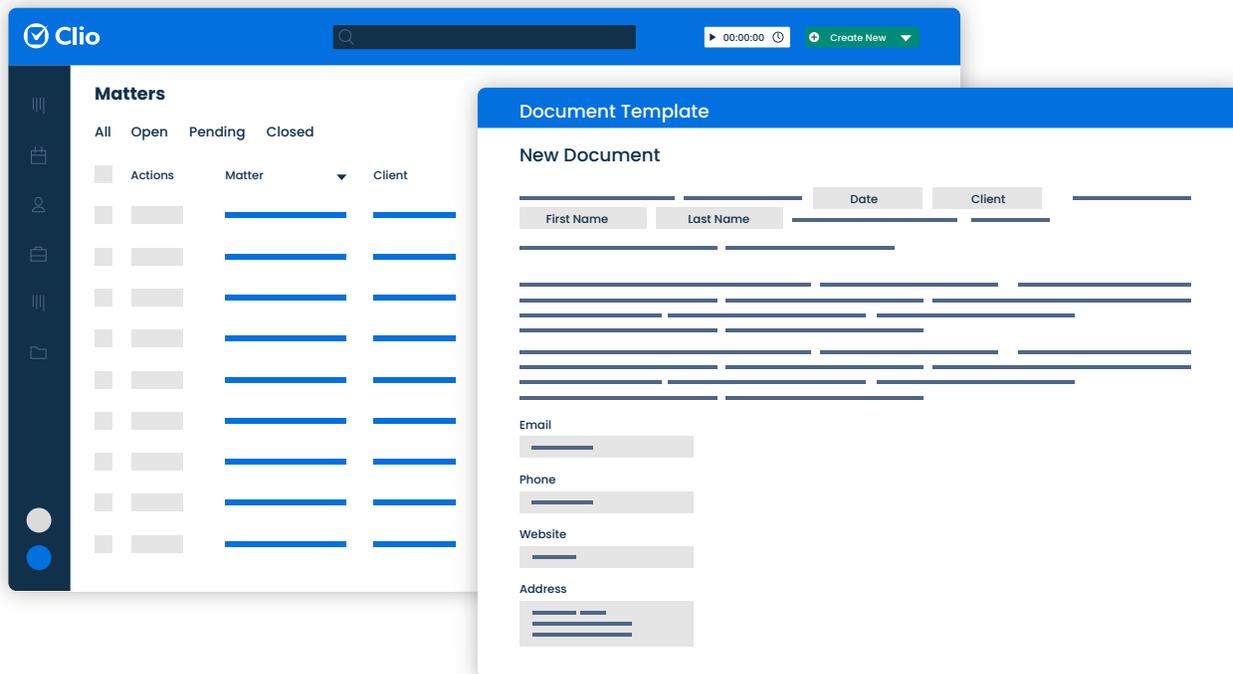
With Clio Manage, you can streamline your firm's operations—freeing up more time to work with your clients.



## ELIMINATE TEDIOUS PAPERWORK WITH ELECTRONIC DOCUMENT MANAGEMENT AND E-SIGNATURES

Clio's [document management](#) system is especially robust. It gives law firms the ability to securely store an unlimited amount of documents in an electronic format that is instantly retrievable by any member of your firm—whether in the office, at home, or anywhere else. Firm members can share documents with clients using the [Clio for Clients mobile app](#), which provides clients with up-to-date case information as they need it.

Clio also features an easy-to-use e-signature service (through DocuSign) that allows law firms to send documents out for instant electronic signatures, directly from Clio. Once your clients sign the documents electronically, the documents will update in Clio—and the firm will get a notification that the documents are ready for review. Clio's powerful document assembly features will also create forms and documents based on specific client or matter information; these files are easy and quick to assemble, share, or edit in any document editing software.



### **STAY ON TOP OF EVERY MEETING AND DEADLINE WITH ADVANCED CALENDARING FEATURES**

Whether in the office, working remotely, or on the go, Clio helps you stay organized with advanced [calendaring](#) features that connect with Google Calendar, Office 365, and Microsoft Teams' scheduling systems. When syncing calendar services, Clio provides bi-directional syncing, which means you can create or update your calendar entries from any app, and Clio will ensure your information is up-to-date across all platforms and devices used by members of your firm.

Once you've created calendar entries in Clio, the software makes it easy to share and invite others to events—whether they are other firm staff, clients, or other parties.

Other calendar features include customizable reminders, the ability to log time entries for more efficient and accurate billing, and the ability to automatically create secure Zoom meeting links before meetings, so everyone can join video calls hassle-free.

Clio also offers an automated court calendaring system that will automatically create events in your calendar based on rules and deadlines for hundreds of US courts. You can create a set of court deadlines in your calendar based on different court milestones, and Clio will create a set of events pertaining to the case, taking into account weekends and individual court holidays.

### **STREAMLINE HOW YOU WORK ON EACH MATTER WITH AN INTEGRATED TASK MANAGEMENT SYSTEM**

Keeping organized across a law firm requires staying on top of every stage of the legal process. Clio's integrated task management features allow everyone at your firm to have an organized to-do list, update progress, and monitor workloads across firm members.

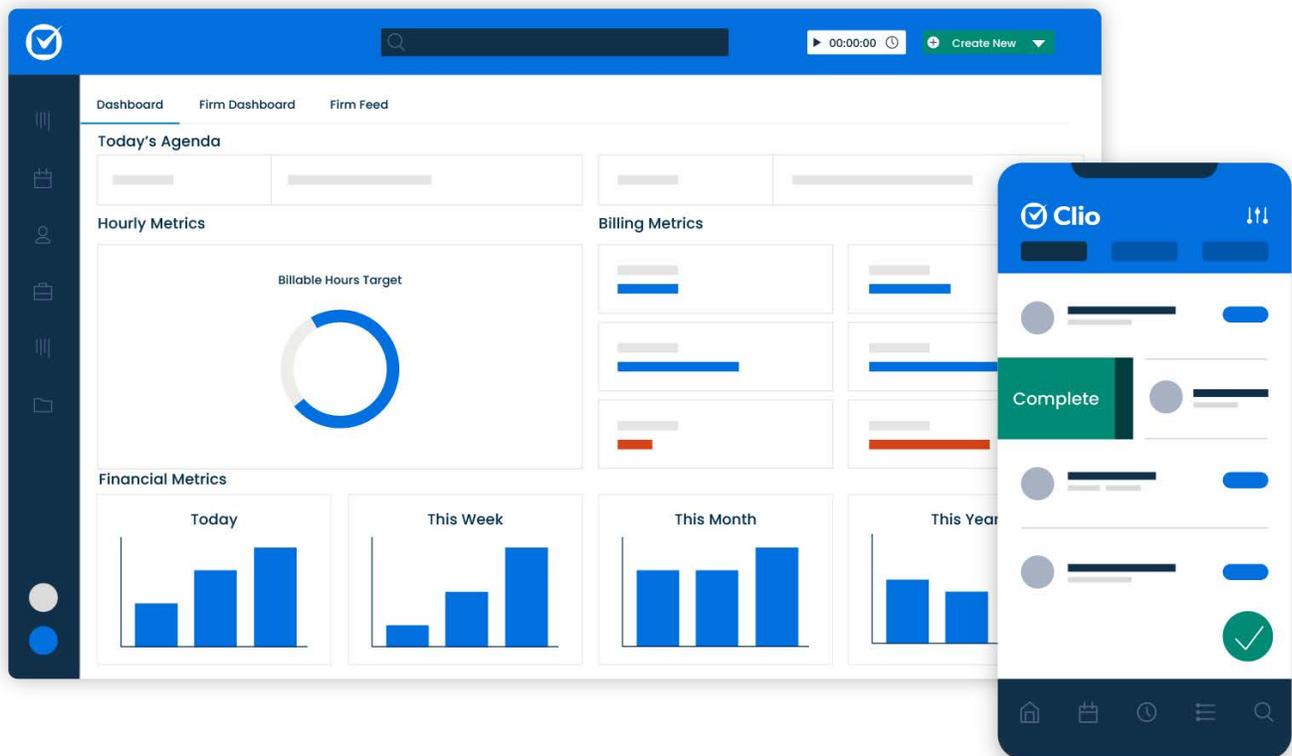
Case tasks can be divided across teams and assigned based on standardized lists for certain case types. Lawyers can log billable time into Clio's time tracking system directly from individual tasks, and detailed reports provide comprehensive overviews of budgeting and productivity.



## MEASURE YOUR FIRM'S SUCCESS WITH DETAILED PERFORMANCE TRACKING

Based on Clio's groundbreaking research into law firm performance and productivity, Clio's solutions give you the ability to monitor key firm metrics from an intuitive dashboard. You can monitor how many hours you and your staff have worked, billed, and collected—and you can identify areas for improvement.

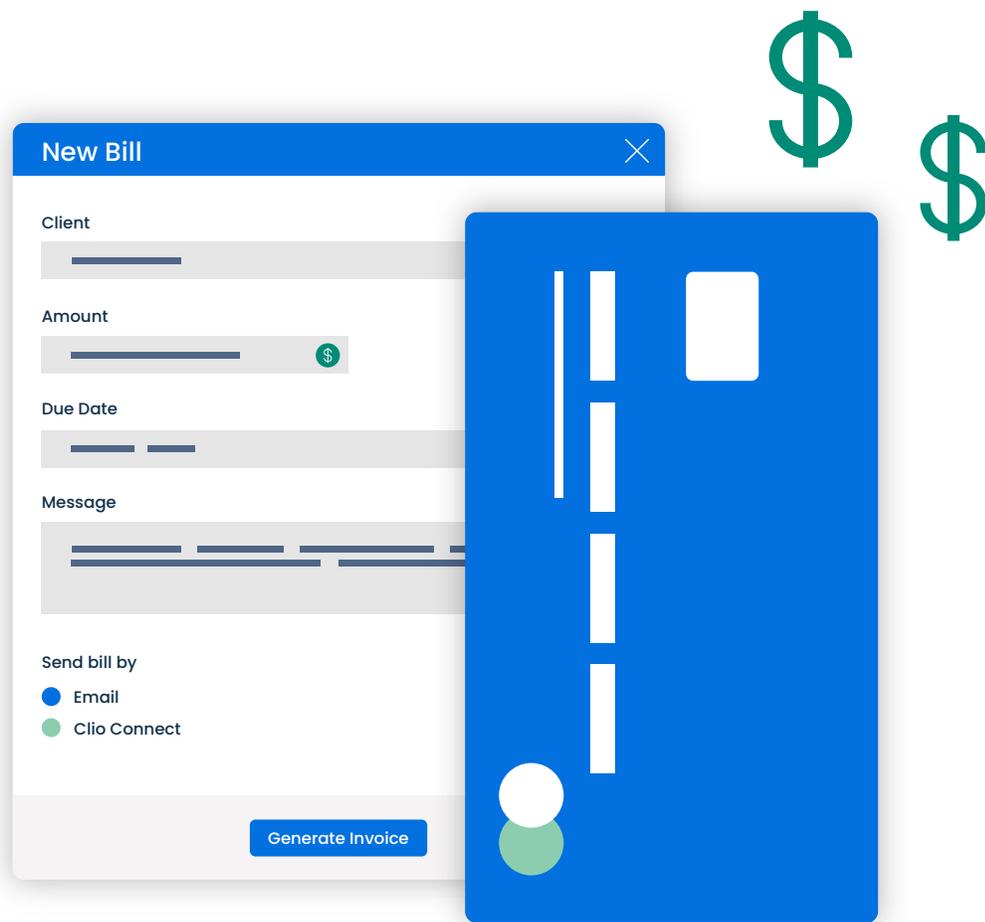
Clio's [Law Firm Insights Dashboard](#) gives you a better understanding of where your time is spent, and how this contributes to overall revenue potential. You can track these metrics over time to better assess firm performance and growth.



# Online Billing and Payments

## GET PAID MORE—AND FASTER—WITH ELECTRONIC BILLING AND CREDIT CARD PAYMENTS

Giving your firm a superior way to handle [billing and payments](#) will help you increase your collections, reduce the amount of time it takes to get paid, and create a better billing and payment experience for your clients. Clio's billing and payment solutions provide law firms with a seamless system for generating bills, running reports, and getting paid faster than by any other means.

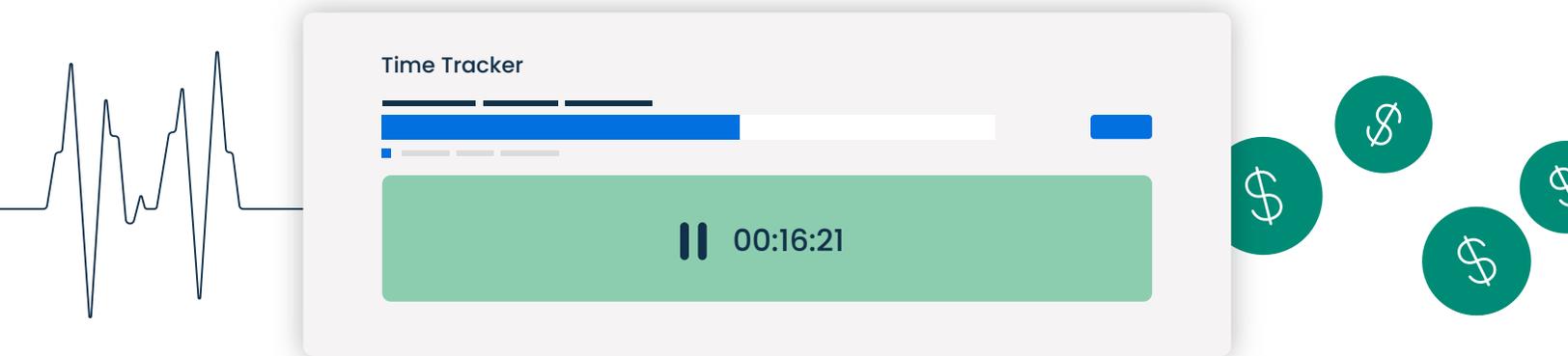


### **TRACK YOUR TIME AND BILL SECURELY FROM ANYWHERE, AT ANY TIME**

You can easily [track time and expenses](#), even while working remotely, via Clio's web-based software and mobile app. You can quickly apply billable time to invoices, which you can generate and share in minutes (sometimes even in seconds).

Clio's comprehensive billing features enable you to quickly edit bills and time entries, or apply interest to late payments. You can share bills electronically via email or Clio's secure online portal, and the bulk sharing feature allows you to share all of your monthly bills at once. (You can, of course, also share bills step-by-step with different groups of clients or individuals.)

For individual clients, you can combine multiple bills to share them as one total outstanding balance, and you can send your clients a secure payment link so they can settle all their payments due in a single online payment.



### **PROCESS ONLINE PAYMENTS AUTOMATICALLY TO SAVE TIME AND HASSLE**

Through Clio's integrated payments functionality, [Clio Payments](#), your clients can pay you online in a matter of seconds. Once a client pays, Clio automatically updates the associated bill's payment status—or, in the case of a trust deposit, Clio automatically directs the money into a client's account according to professional rules for the handling of client funds.

With Clio Payments, you can also set up payment plans that will automatically process recurring payments on behalf of your clients. You can set a payment plan to expire after a specific amount of time, or once a total amount has been paid. This gives your clients more flexible options to pay their legal fees or ensure their trust accounts maintain appropriate balances.

### **GENERATE COMPREHENSIVE BILLING REPORTS**

At any time, you can use Clio to generate billing reports that give you detailed insight into the status of all your accounts receivables and overall firm finances. Based on individual clients, lawyers, date ranges, case types, or trust account statuses, this reporting gives you a better idea of where the firm stands each month in terms of billing and collections.



Clio Manage has saved me a great deal of time and aggravation in practice management, making the practice of law more enjoyable.

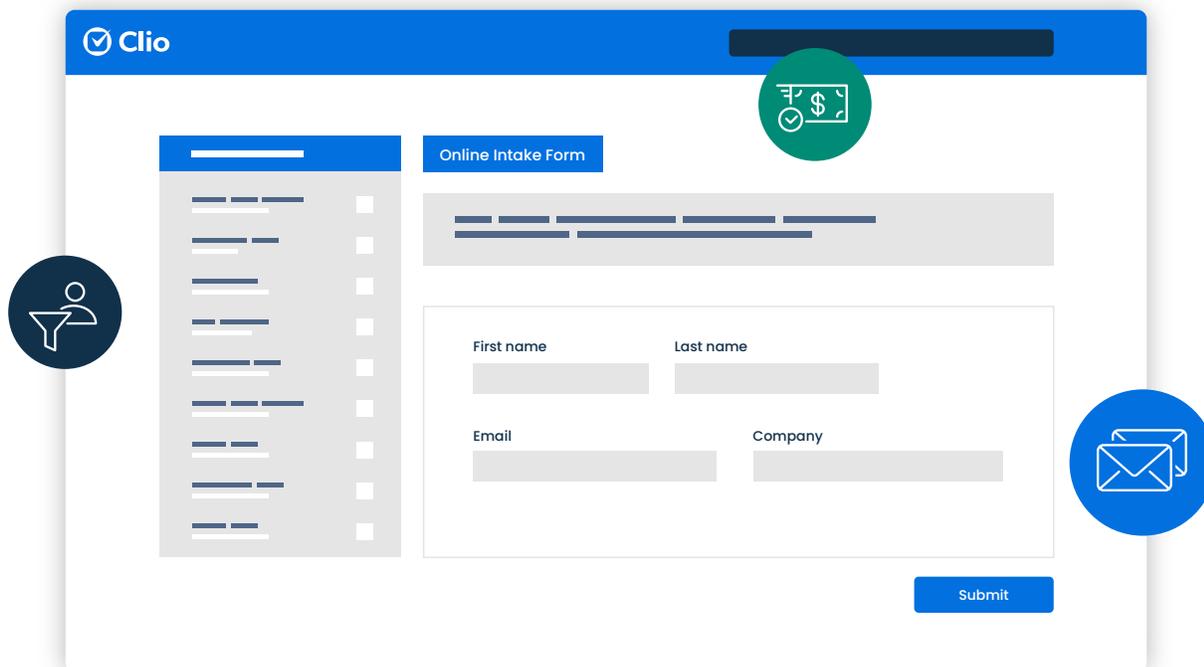
#### **DOUG FOOTE**

Sparkman + Foote LLP



# Clio Grow

## Client Intake and Client Relationship Management (CRM)



### RETAIN MORE NEW CLIENTS AND ENHANCE COMMUNICATION

Beyond comprehensive case management and billing solutions, Clio gives you the ability to earn more business and streamline all of your firm's outbound communications. With [Clio Grow](#), Clio's client intake and client relationship management (CRM) software, you can attract potential new clients, keep prospects from falling through the cracks, accelerate your client intake process, and keep better tabs on all of your firm's relationships.



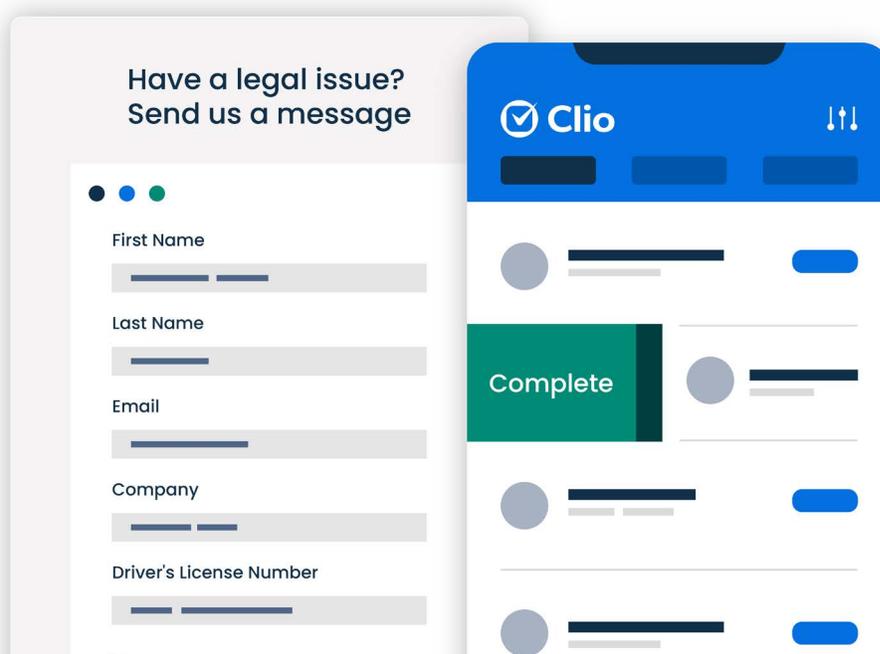
## BRING POTENTIAL NEW CLIENTS INTO YOUR FIRM QUICKLY AND EFFICIENTLY

Clio's [client intake system](#) helps you provide attentive service to potential clients reaching out for legal assistance. From the moment a new prospect first contacts your firm, Clio helps you seamlessly bring the prospect into your system via customizable online intake forms which rapidly gather the potential client's information. All of the form information automatically populates into the prospective client's electronic records—should they hire your firm, the client's information will be readily available across the entire Clio platform, so you never have to input data multiple times.

## SCHEDULE CONSULTATIONS AND COLLECT PAYMENTS ONLINE

With Clio's [appointment booking](#) features, potential clients can quickly schedule appointments in your calendar simply by clicking a link you share with them via email (or on your website). Clio also integrates with Google My Business, so if a potential client comes across your firm during an online search for legal services, the client can book an appointment with you directly from their search results.

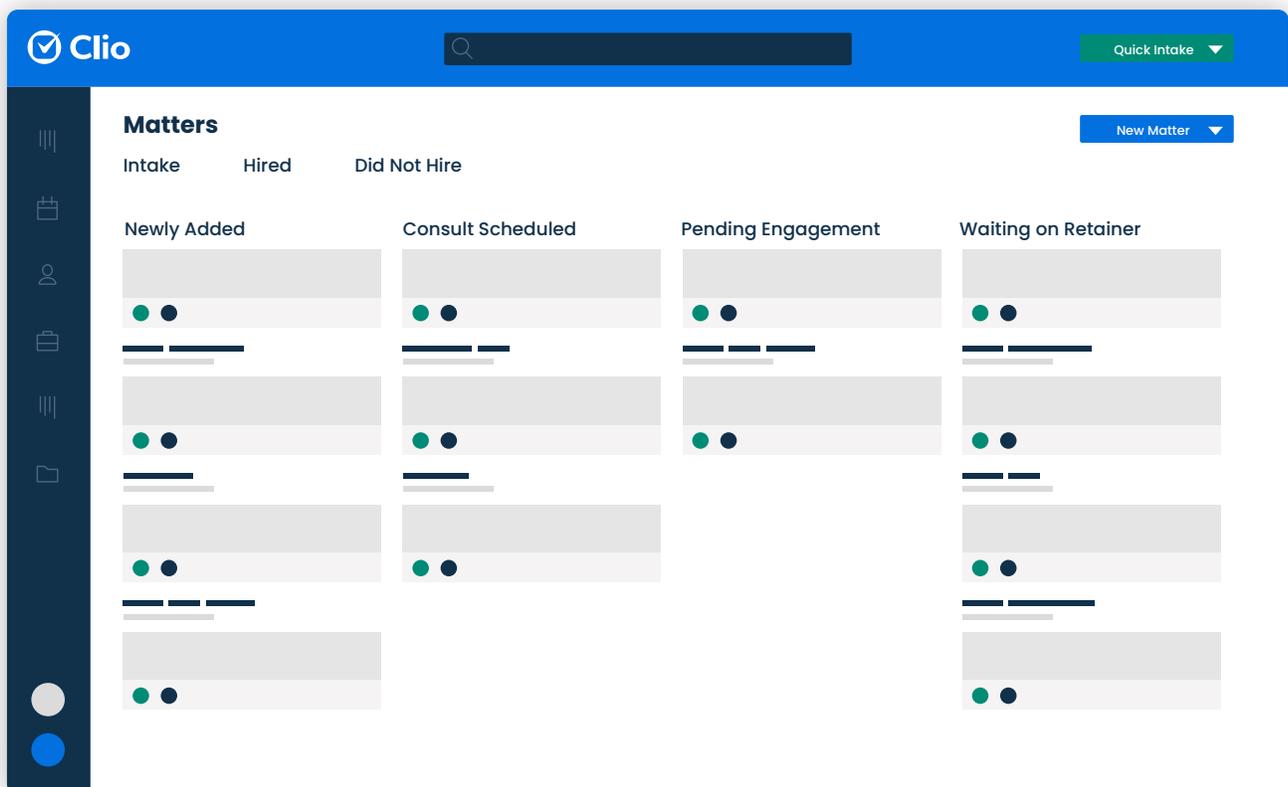
You can add automated payment features to online appointment bookings, thus enabling potential clients to pay in advance of their consultations. (These payments are then automatically deposited to your firm's operating account.) You can also automate the creation of retainer agreements and share them instantly for clients to sign via e-signature—without the need for mailing, faxing, or in-person meetups.



### GAIN A BETTER UNDERSTANDING OF YOUR CLIENT INTAKE PIPELINE

Clio gives you more [insights into prospective clients](#), which can be especially valuable when checking for conflicts of interest. You can search incoming prospects within your existing contact and matter database to quickly identify if a person has any association with current or past matters.

Clio also allows you to collect detailed information on how potential clients discover your firm. You can combine this data with the eventual earnings you receive from the client or matter, and this enables you to identify which business sources are most lucrative for your firm. This helps you learn which clients and matters generate the most revenue for you, so you can maximize new revenue opportunities and adjust your business strategies as needed.



# Pricing

**FLEXIBLE PLANS.**

**POWERFUL FEATURES.**

**SIMPLE PRICING.**

Pick a plan that's right for your law firm.  
Streamline your firm operations with online  
time tracking, billing, payments, and more.

For pricing information,  
visit [clio.com/pricing](https://clio.com/pricing).



THE WORLDWIDE LEADER IN  
CLOUD-BASED LEGAL TECHNOLOGY

# Getting started with Clio is easy

Clio's cloud-based solutions are free to try, and the company offers a large roster of support, training, and practice management experts. The Clio team has helped tens of thousands of law firms get up and running—including migrating data from other software providers. To see how Clio can help you manage and grow your firm, schedule a free demo at [clio.com](https://clio.com), call 1-888-858-2546, or email [sales@clio.com](mailto:sales@clio.com).