

CLIO BUYER'S GUIDE

The leading legal practice management software

From intake to payment,
and everything in between.



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



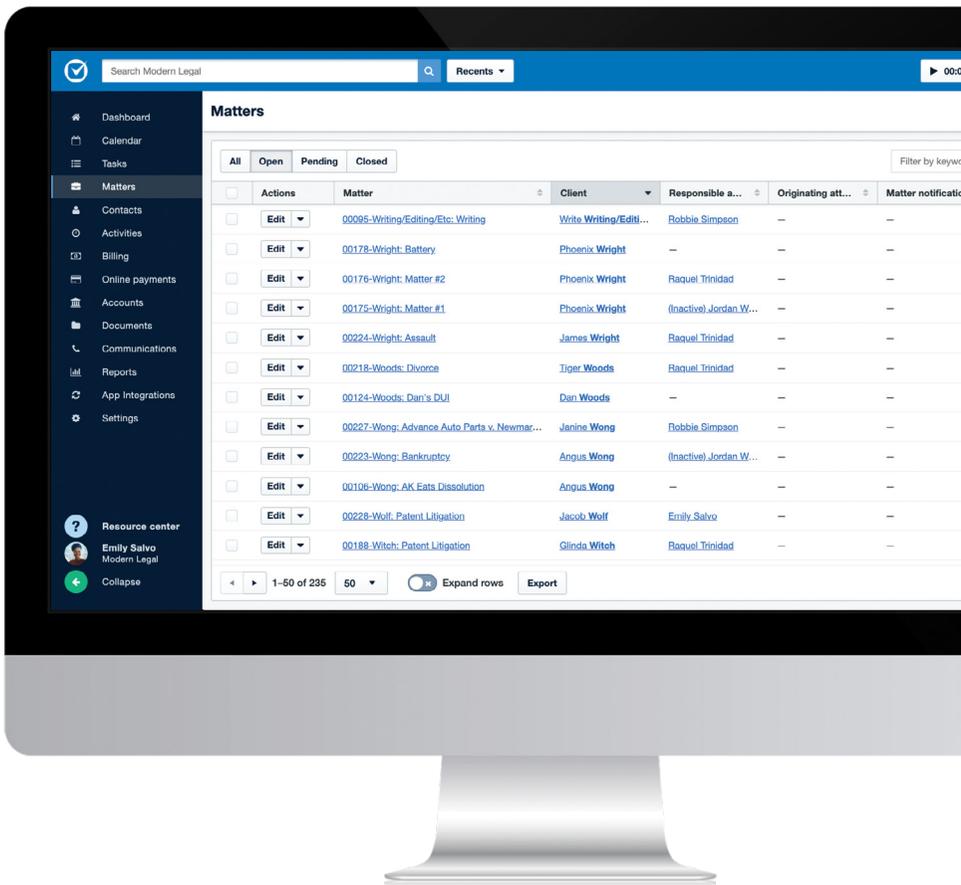
We've grown by like five times what we anticipated—year over year over year. It's just a stronger presence.

JEFFREY FORTE

Founding Member & Partner, Forte Law Group

Clio Manage

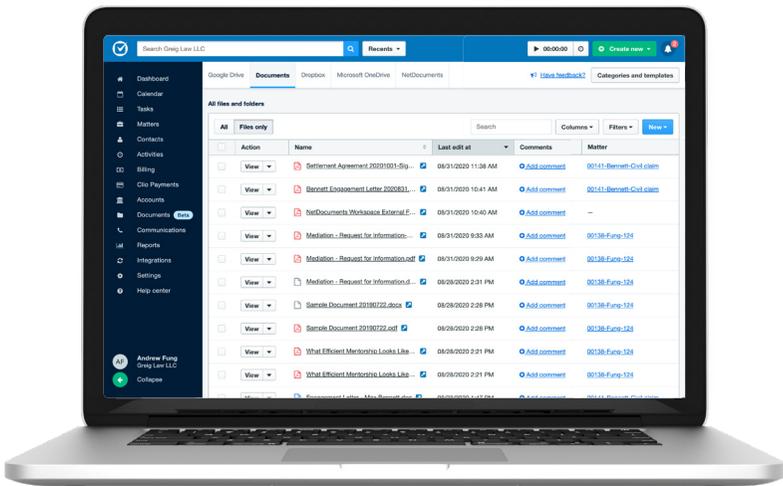
Connect everyone and everything across your firm.



Clio Manage

Centralized document storage and management

Keep all of your documents in one place—and easily locate what you need anytime. Store unlimited documents in the cloud, link them to your matters, and send them out for e-signatures, all from your Clio dashboard. Then move on to your next task by searching for and locating the next document in seconds.



Our lawyers are spending a lot more time working on legal issues instead of things they really shouldn't be working on. For myself, it's freed me up so that I can spend a lot more time working on the business instead of in the business.

BEAU ATKINS

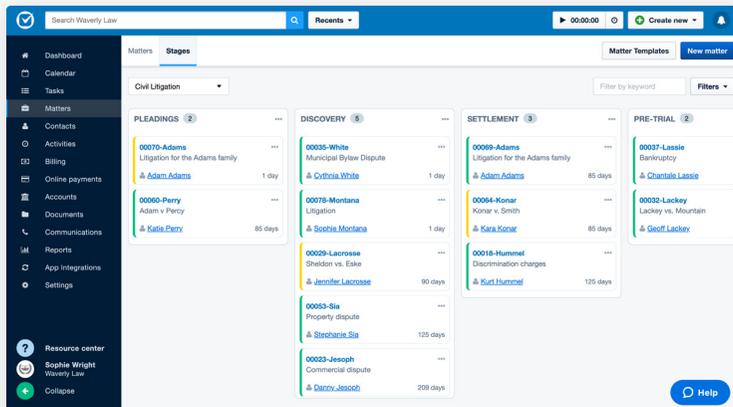
CEO, Evolve Family Law

Bill and get paid faster

Reduce the amount of time it takes to get paid and create a better billing and payment experience for your clients. Offer clients the flexibility to pay by debit, credit, and eCheck, and get money into your accounts faster. With Clio, you can process payments online, or in-person by tapping physical cards or digital wallets. Clio also streamlines invoicing, trust requests, and payment collection in compliance with trust accounting rules.

Take back your time

Automate your most time-consuming work. From time and task tracking to document creation and collaboration, Clio simplifies routine, day-to-day tasks. At a glance, relevant members at your firm can see matter progress and action the most important next steps.



Deliver meaningful client experiences

Earn trust by keeping clients up to speed on their case at all times with Clio's built-in communication suite. Offer your clients a convenient mobile app to securely share documents, make payments, and communicate on the go.

Discover a better way to work with the tools you want

Seamlessly connect the tools you're already using in one centralized workspace. Clio integrates with over 250 of the legal industry's most popular apps, including your preferred email, video conferencing, and virtual receptionist.



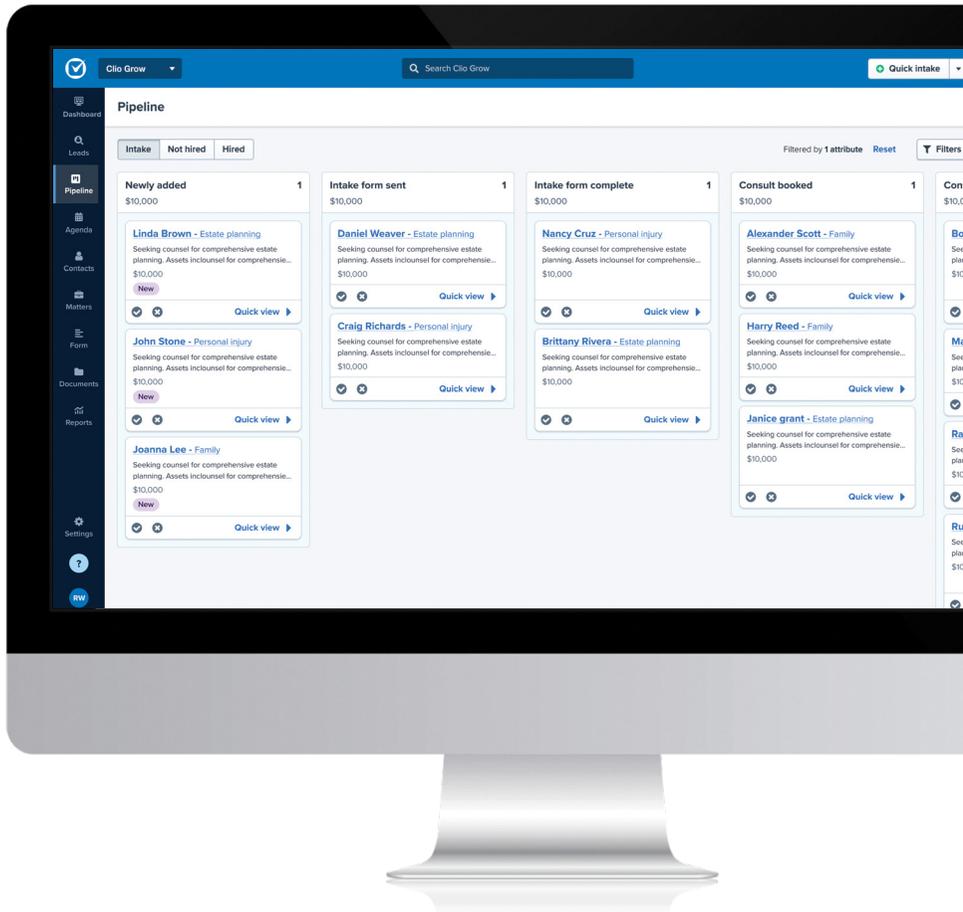
No client gets left behind. No one falls through the cracks because we can keep track of everybody so well.

VERONICA KROPFF

Intake Concierge, Puget Law Group

Clio Grow

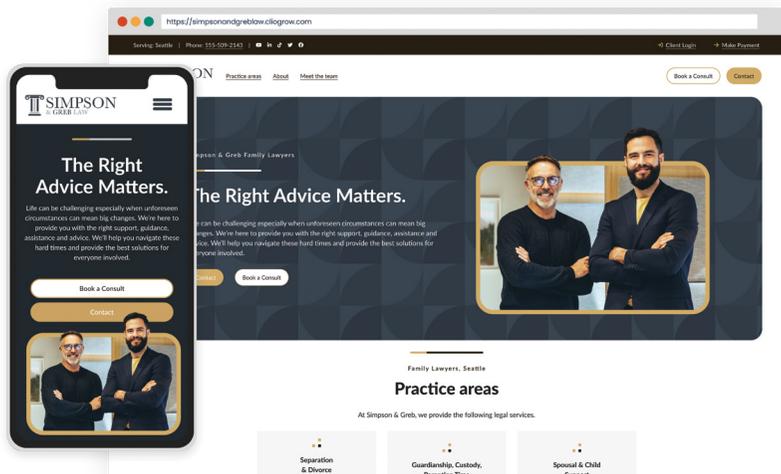
Organize your intake process



Clio Grow

Attract and win new clients online

As more clients search for legal services online, your firm's web presence is more important than ever. Make your firm stand out by advertising on Google, impress new clients with a professional website, and make it easy to get in touch with online appointment booking.



Automate manual tasks

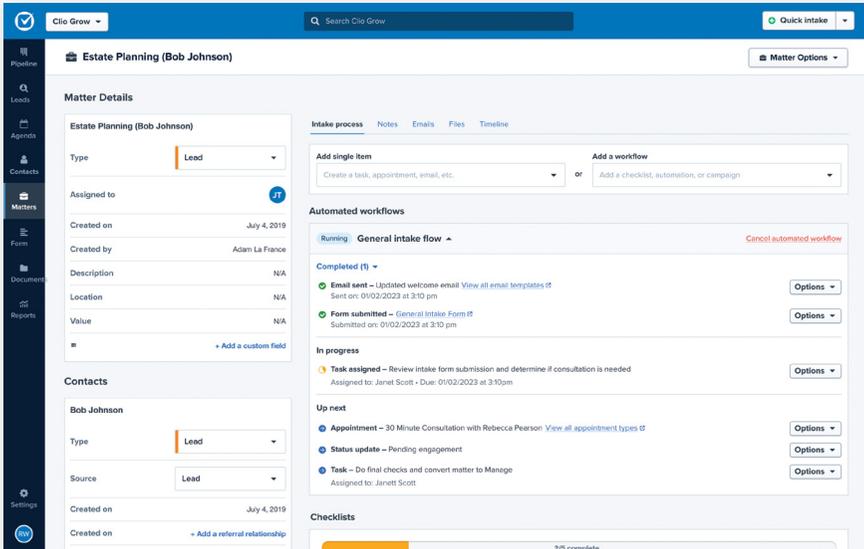
Bring on new clients with less data entry and fewer errors. Online intake forms help you collect prospective client information in a central place and save you from manually entering information. Automatically generate agreements and use follow-up emails and reminders to keep tasks on track.

Deliver a consistent client experience

Standardize your client intake process from first contact to signing a retainer. With Clio Grow, you can see where potential new clients are in the intake process from a single dashboard, and automate next steps to ensure you're delivering a consistent client experience every step of the way.

Capitalize on every opportunity

Clio Grow collects detailed information on how potential clients discover your firm and their projected case value, to help you identify where you're generating the most revenue and how to adjust your business strategies to maximize results.



The screenshot displays the Clio Grow interface for a matter titled "Estate Planning (Bob Johnson)". The interface is divided into several sections:

- Matter Details:** Shows the matter type as "Lead", assigned to "JT", and created on July 4, 2019, by Adam La France. It also lists "Description", "Location", and "Value" as "N/A".
- Contacts:** Lists "Bob Johnson" as the contact, with the same "Lead" type and creation date.
- Intake process:** Includes a search bar and options to "Add single item" or "Add a workflow".
- Automated workflows:** Shows a "General intake flow" that is currently "Running". It lists completed tasks such as "Email sent" and "Form submitted", and tasks "In progress" like "Task assigned" and "Up next" tasks like "Appointment" and "Status update".
- Checklists:** A section at the bottom with a progress bar indicating "2/5 complete".



I've been able to reduce my consultations from 30 minutes to 10 or 12 minutes. It saves time for my clients, and they really like the streamlined process.

VERNON BROWNLEE

Attorney and Business Owner, Law Office of Vernon Brownlee



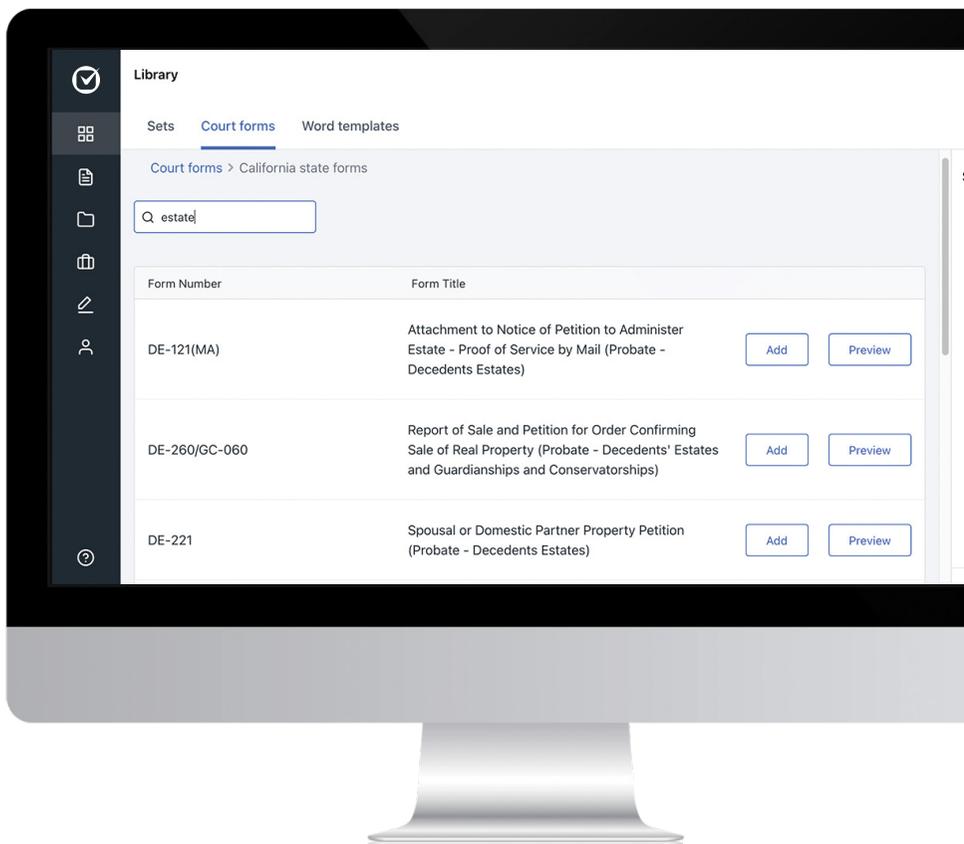
Prior to Clio Draft, creating each document would take anywhere from 30–60 minutes. Now, the process—at most—takes 10 minutes.

EMMA RUCKER

Managing Paralegal, Cohen Family Law

Clio Draft

Automate routine document drafting.



Clio Draft

Simplify drafting with a library of document templates

Templates are the easiest way to create routine documents. Build smart templates from your paper or Microsoft Word documents and give everyone instant access to a library of up-to-date court and immigration forms.

Prepare routine legal documents in seconds

Clio Draft's advanced document automation platform ensures you never have to enter information more than once. Group commonly used documents into sets that you can simultaneously populate with client and matter information collected in Clio.

The image shows a screenshot of the Clio Draft Template Builder interface. On the left, a Microsoft Word document is open, displaying a legal document template with various fields highlighted in yellow. The fields include: [ATTORNEY FULL NAME], SBN [ATTORNEY STATE BAR N...], COTTINGHAM, BECKER & WHITE, LLP, [ATTORNEY STREET ADDR...], [ATTORNEY CITY], [ATTORNEY STATE] [Attorney Zip Code], Phone: [Attorney Phone Numbe...], Attorney for Plaintiff, [PLAINTIFF FULL NAME], Plaintiff, v., [DEFENDANT FULL NAME], Defendant, and COMPLAINT FOR DIVORCE. The status bar at the bottom indicates 'The Plaintiff [Plaintiff Full Name] currently reside at [Plaintiff Street Add...], [Pl...]

On the right, the Clio Draft Template Builder window is open, showing the configuration for the 'Clio Matter' template. The window has tabs for 'Fields', 'Conditions', and 'Templates'. The 'Fields' tab is active, showing a list of fields to be added to the template. The fields are grouped under 'Attorney' and 'Plaintiff'. The 'Attorney' group includes: Add field to card, Full Name (2), Street Address (1), City (1), State (1), Zip Code (1), Phone Number (1), and State Bar Number (1). The 'Plaintiff' group includes: Add field to card and Full Name (2). A '+ New card' button is visible at the top right of the field list, and a 'Save template' button is at the bottom right.



I'm earning about 40% more revenue per month based on the same amount of time and effort. A lot of that has to do with my ability to seamlessly flow clients from intake through to resolving their case.

ROBERT JEWETT

Attorney and Counselor, Robert Jewett Law, PLLC

Getting started with Clio is simple

Transition with ease

Our team will help bring your information into Clio and get you set up in a way that works for your firm.

Learn your way

Get up to speed with live training sessions, guided onboarding, and a complete library of resources.

Answers at hand

Our team of experts is ready to help 24/5 by phone, email, and live chat. Or, visit our online help center.

Ready to learn more?

Visit clio.com | sales@clio.com | 1-888-858-2546 EXT. 1

Find a plan that's right for your firm

EasyStart	Essentials	Advanced	Complete
Track your time and get paid.	Centralize the way you work and connect with clients.	Maximize productivity and improve business intelligence.	Get everything you need to run your firm, from intake to settlement.

For pricing information, visit clio.com/pricing.

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