Changing Where Legal Professionals Spend Their Time: A Letter from Jack

Written by Jack Newton

At the end of last year, I announced Clio's vision for creating a centralized, cloud-based legal operating system.

While legal practice management software is core to our business, we know you need more than just case management from Clio. In order to thrive, you need to be able to do more with your time. That's why we've focused on expanding our product platform to seamlessly connect you to everything across your firm, clients, and cases.

Six months since announcing our new product vision, we've built several enhancements that help you extend your abilities without extending yourself.

Easier payment collection. We know that payments are the most frequent point of friction in attorney-client interactions—and managing them bears a heavy burden on firm operations, time, and revenue. That's why we've built end-to-end payments into Clio Manage and included it as part of your existing subscription. You can now manage all things payments right from Clio:

- Accept payments with secure eCheck/ACH, credit cards, or debit cards
- Use flexible payment plans to convert large bills into manageable installments
- Access your statements and transaction reports, so you don't have to wait until the end of the month to know your processing costs
- Securely save your client's payment information at any point in time—from when you're intaking to when you're invoicing
- Keep your trust accounts regulation-compliant and your client payment data protected with bank-grade security
- Pay a flat and simple transaction fee for all card types with no additional transaction or card network fees

Personalized billing. We understand that how you bill your clients has a direct impact on when and if you get paid. As such, we've enhanced our billing tools to include the ability to:

- Customize your sender email address to your own on outgoing bills
- Use new autofill fields—including client name, matter name, and invoice number—to personalize bill messages

- Select autofill fields, such as client first name, to populate in the subject line of your bill messages
- Share bills and outstanding balance notifications with a clearer, more intuitive workflow
- Generate bills exclusively for time entries or expenses

More operational efficiency. Clio enables you to automate the critical day-to-day tasks of your business while enabling you to operate from your mobile devices, be in two places at once, or simply get time back to use as you want. In recent months, we've remained committed to improving your firm's productivity through new capabilities:

- Securely create, access, edit, store, and collaborate on files and folders from the convenience of your desktop withClio Drive
- File emails, attachments, and associated time from Outlook to Clio in just one step with our reimagined Outlook Add-In
- Easily toggle between Clio Grow and Clio Manage, sync contacts and matters from Clio Grow to Clio Manage with one click, and locate previously synced contact and matter records at-will
- Duplicate task lists, assign them from within a matter, and sort them alphabetically or by due date
- Stay on top of shifting court deadlines by updating an individual event date/time and selecting associated future events to recalculate in just a few clicks
- Personalize your court rule scheduling with custom times and reminders
- Use Clio to sign up for and log in to third-party applications

Centralized client experiences. We know that effective communication and collaboration are key pillars in your ability to deliver stellar client experiences. To help you facilitate these pillars, we've added the ability to:

- Manage client communications, share documents, capture billable time, send secure messages, view firm-wide client communications, and more—from the new Clio for Clientsportal
- Automatically deliver text message-based notifications and reminders to your clients (and yourself!) for scheduled events
- Enable push notifications on your Clio mobile app to get notified of new client messages in real-time
- Access Clio for Clients messages and documents in the app to avoid switching tools
- See when your clients have opened a document or viewed a message in Clio Manage
- Print a comprehensive PDF record of communications for saving or presenting to the court

We've also launched a HIPAA compliance offering to better serve the needs of firms practicing in personal injury, insurance defense, elder law, medical malpractice defense, and beyond.

If any of these solutions are new to you, I encourage you to reach out to our support team, who are ready to help you learn this new functionality and create the best process and workflows to set your firm up for success today and into the future.

What's next

In this next chapter, we will continue to innovate rapidly and provide you with the utmost value and support your firm deserves because we know if you are not in a position to thrive, we cannot transform the legal experience for all, together.

Sincerely,

Jack Newton

CEO and Founder of Clio

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.