Clio This Month: Dashboard Update, Task Notifications, and New Integration Partners

Written by Teresa Matich

Happy belated Saint Patrick's day from the Clio Team! What have we been up to this month? In addition to attending and speaking at ABA TECHSHOW, we updated two key Clio features and partnered with five amazing products and services that, combined with Clio's practice management software, can take your practice to the next level.

Read all about it below.

Bonus: We've also got a quick tip on how to securely share information with your clients via Clio Connect.

Refined billable target options

Clio's practice performance dashboard provides a high-level overview of your practice. Aside from showing you tasks to-do and upcoming appointments, it lets you see hours billed compared against your billable hours target, so you can check whether you're on track to meet your goals.

Now, you can further refine this target by setting it according to the number of days you'll actually work in a year.

While billable hours targets can be helpful motivators, they should also be realistic. Lawyers are some of the hardest working professionals out there, but they aren't logging 24 billable hours per day, seven days a week.

Taking a month-long vacation to Europe? Living a flexible lifestyle and working four-day work weeks? You can now adjust your billable hours targets accordingly.

It's easy: Simply click the "gear" icon next to the billable hours target on your practice performance dashboard ...

... and adjust your number of working days per year.

Then click "Save Practice Information" and you're done!

Learn more about billable target options

New and improved email notifications

When you're working on a big case, you don't have time for miscommunication and cumbersome handoffs. Everyone on your legal team needs to know when they've been assigned a task—and they need to quickly access the information necessary to complete their work.

That's why Clio's email notifications and reminders have gotten a big upgrade.

Now, you can link directly back to the matter associated to the task at hand within an email notification. That means the receiver doesn't need to go hunting around for the right matter each time a new task is assigned.

On top of that, the task's status, description, due date, and priority level will be included in the body of any notification email. If it's an urgent task, there will be a "high priority" tag at the top of the email, ensuring that the most important things don't get overlooked.

Use these notifications to clearly and quickly communicate important information to your clients and team members.

Six more additions to Clio's growing list of integrations

Clio isn't just practice management software. It's a practice management platform that integrates with over 50 programs and services. This gives you access to plenty of extras to keep your firm even further ahead of competitors.

At this year's ABA Techshow, we welcomed six new partners to the fold:

Apptoto is an automated scheduling and reminder platform. Use it to automatically send appointment reminders, confirmations, and follow-ups (over text, voice calls, or emails) to clients.

Apptoto syncs with your Clio calendars. Firms using Apptoto with Clio have seen an immediate and dramatic reduction in no-shows (of up to 75 percent) and an overall increase in revenue and billable hours. Learn more about Apptoto.

Nextchapter is a cloud-based solution that lets lawyers prepare, manage, and file bankruptcy cases online. Tasks and matters sync bilaterally with Clio, so you can easily manage your cases in Clio, and sync important client information with Next Chapter for

preparation and filing. Bonus: Nextchapter offers free filings for pro bono cases! Learn more about Nextchapter.

Legalist is a data-driven litigation financing provider. From monthly legal bills to expert witness fees, Legalist helps pay for litigation—with no obligation for repayment unless your case wins.

Clio users can use their current case data in Clio to submit a case for litigation funding with Legalist in one click. Learn more about Legalist.

Clause is an Internet of Things (IoT) 'smart contract' provider.

Clause connects your contracts with Clio, allowing you to see changes to contract states, delays in performance, impacts on pricing/payments, and other contractual events—all in real-time. Learn more about Clause.

LawLytics is a simple platform for building websites for lawyers. Founded by attorney Dan Jaffe as a response to his frustrations with the legal marketing industry, LawLytics aims to empower attorneys to grow their practices without wasting time or money. Learn more about LawLytics.

CyphraTek gives Clio users the ablity to encrypt and track attorney-client email exchanges from any device. With two-factor authentication, Cyphratek provides a substitute for traditional courier services with a more efficient and court-recognized email management system.

For more information on these integrations—and on other services to step-up your law firm's game—visit our integrations page.

Explore integrations

Tip: How to send client information with Clio Connect

As a lawyer, it's your duty to promptly communicate with your clients. However, you also need to make sure that you're sharing key documents through secure, encrypted channels —otherwise, you could risk breaching client confidentiality.

What Clio users are saying about us:

We love making our customers happy. Here's what they have to say:

> “Where have you and Clio been all my life? Today, I had to do a manual override on a matter number and your product is unbelievably easy to use and your website makes it easy to find help. It took me less than five minutes to find what I needed and make the real time change ... Thank you! Thank you to Clio! Thank you to the developers, support staff, and executive staff!”

– Heather W., United States

> “Clio has changed our business from the outset. We are managing time better and all our tasks flow seamlessly. I researched before we committed and I am only too delighted to recommend them. I believe often it’s the support service that makes or breaks a solution and the Clio Team are simply exceptional.”

– Duncan Sims, Lawbrook Grace LLP, United Kingdom

Like this post? Want more like it? Subscribe to weekly emails from the Clio blog, and never miss an idea for improving your practice.

Subscribe for updates

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.