# 2017: Clio's Biggest and Best Year Yet

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With the launch of the new Clio experience, the release of the second-annual*Legal Trends Report*, and our biggest and best ClioCon yet, 2017 was one for the books at Clio.

We're thrilled to have shared the past year with all of the amazing legal professionals who use Clio every day, and together in 2018, we look forward to continuing to transform the practice of law, for good.

Here are a few highlights from the past year, by the numbers:

## 220+ improvements, 1 new Clio experience

Nine years ago, we changed the legal industry with the release of the world's first cloud-based legal practice management software.

This year, we've completely re-engineered Clio from the ground up to be faster and more intuitive than ever before. The new Clio experience includes over 220 improvements and was built based on 600+ hours of interviews, 60+ days of visits with Clio customers, and countless hours spent reviewing customer and industry feedback.

By implementing the latest technologies and reengineering Clio's technology, we've laid the foundation for a future of constant improvement. We're only getting started.

Here are some of the key highlights:

### 5X faster navigation

We've made key changes to the core of how Clio operates, making it run five times faster than before. Clio now uses a single-page architecture design, which means the main navigation bars stay in place, and only the content that's changing on the page reloads.

### 20X faster search

With new search technology, searching for information in the new Clio experience is incredibly fast—and when you use it, more often than not, you'll immediately find what you need in results that auto-populate as you type.

## Global Create functionality in the Clio Web App

The Global Create button was rolled out for the Clio iOS mobile app at ClioCon 2016, and then to our Android app. This year, we were proud to launch it as part of the Clio web app.

With Global Create, you can easily create a new entry—including matters, contacts, secure messages, time entries, tasks, calendar events, expenses, trust requests, and more—from anywhere within Clio.

## Single-click time tracking

The new Timekeeper allows you to start recording time with a single click from any screen within Clio. Featuring multiple timers, you can now start, stop, and save a time entry from anywhere. Once you pause or stop recording time, a time entry form automatically opens for you to record details—and, to ensure your entries don't get lost, you'll be prompted if you forget to specify a matter.

## Bulk billing

Need to handle multiple bills at once? Whether you're looking at two or ten thousand invoices, bulk actions allow you to complete tasks at scale. Additionally, you'll have the ability to apply payment to multiple bills associated with a single client with one powerful action.

## Faster bill approval and trust payment application

The ability to approve and apply trust payments to invoices with one click makes cumbersome end-of-month billing processes much faster.

At the same time, this new workflow eliminates room for error, giving you 100% peace of mind.

## Start the new year off right: Start using the new Clio experience to help your firm level-up in 2018. Try it for free today.

Try Clio for free

In addition, we've made a few more key improvements to help law firms run more efficiently this year:

### New QuickBooks Online trust sync

As a lawyer, you need to stay compliant when it comes to trust accounting. We think that should be easy. That's why our developers have worked long and hard with the accounting experts at QuickBooks Online to make it possible to sync trust transaction information from Clio to QuickBooks Online.

Follow these simple instructions to set it up for your firm in minutes.

### Updated mobile apps

In 2017, you need an app that lets you truly manage your practice from the palm of your hand. We're always improving Clio's mobile apps, and based on feedback from lawyers and legal professionals like you, we rolled out several improvements to our iOS and Android apps this year.

If you're using Clio for iOS, you can now start logging time quickly and easily from anywhere within our iOS app, as the Timer is now accessible via the Global Create menu.

If you're using Clio for Android, you can now save Clio's Timer Widget directly to your Android phone's home screen (here's how you do it) to make it easy to capture and keep track of time without even opening the app.

### Introduction of live in-app chat

When you have a question about your practice management software, you need to have it answered quickly. Clio is already well-known for its excellent support, and we're constantly striving to make this easier.

In 2017, we added the ability to talk to our award-winning support team from right inside Clio.

Live chat is available from 5:00 a.m. to 5:00 p.m. PT (8:00 a.m. to 8:00 p.m. ET). Have a question outside of those times? No problem. Chats sent outside of business hours are sentas an email for quick follow up.

## 66 Apps in the new Clio App Directory

Clio isn't just practice management software—it's a platform that works seamlessly with all the leading tools for your law firm. The new App Directory makes it easier than ever to discover tools that make sense for your firm, and that integrate directly with Clio, so your practice can run more efficiently than you ever thought possible.

So far, Clio integrates with over 66 apps (plus the hundreds more you can connect using Zapier), including 12 new Clio integrations announced at this year's ClioCon. Here are just a few examples:

- Tali, a voice-driven productivity assistant that allows you to log time to Clio via voice command using any Amazon Alexa-enabled device.
- TrustBooks, cloud-based software that helps attorneys easily manage their trust account and stay compliant with their state bar.

We've added plenty more apps to make your firm more efficient and successful in 2018, so explore Clio's new App Directory today.

Visit App Directory

# 1 new open API

An Application Programming Interface, or an API, defines how different programs interact with each other. A more robust API means a greater ability for powerful tools to integrate directly so that those using them can access everything they need in one place.

Clio is now running completely off of an updated API that has greatly expanded the ways that other programs can work with Clio. With our new API v4, developers are empowered to build even more impressive integrations with Clio, giving you powerful options to personalize Clio for your practice.

# $1 million Clio Developer Fund and $100,000 Launch//Code Contest

To jumpstart the creation of even more useful apps that integrate with Clio, this year we kicked off Launch//Code, a contest made to find the most creative, powerful, and useful integrations for Clio. The winning company or business will take home a $100,000 prize, so be sure to tell your developer friends to apply!* Check out the official rules at clio.com/launch-code.

More broadly, to support those working on exciting applications that integrate with Clio, we're also launching the Clio Developer Fund, a $1 million fund that will be used to assist new Clio partners in the development and marketing of their integrations.

In short, we're investing in making Clio a powerful platform, but we're also aiming to have a magnifier effect on the tools available to you by investing in the legal tech community more broadly. Here's what Jordan Couch of Palace Law had to say about these initiatives:

> "I know one of Clio's values is 'Customer success comes first,' and this is a huge example of that. Clio is not just saying 'You have to use our tool for everything you do.' They're saying 'No, we want you to have the flexibility to use other tools, and we'll even invest in those tools, because we think it's important to have them.' That's unheard of in this community."

## 1,000 attendees at the biggest and best ClioCon yet

This year, ClioCon moved from the Windy City to New Orleans, and it's safe to say it was the biggest and best ClioCon yet. Not only did we launch the biggest release the legal industry has ever seen with the new Clio experience, we kicked off our Launch//Code contest, hosted The Reismans, our first ever recognition program for exceptional Clio customers, and launched our second annual Legal Trends Report. Featuring innovative speakers like Chris Hadfield, Haben Girma, and Preet Bharara, attendees walked away with plenty of insights to help them run their practices better.

Just look at what Clio user Chris Trebatoski had to say about the conference.

# 2nd annual Legal Trends Report released

In 2016, we released the groundbreaking *Legal Trends Report*, drawing on aggregate and anonymized data from over 40,000 Clio users to give solo and small firm lawyers access to unbiased data about legal industry trends important to them for the first time ever. This year, the *2017 Legal Trends Report* goes a step further, expanding our analysis of key benchmark trends to include survey data from nearly 3,000 legal professionals and more than 2,000 consumers.

Some key findings? Lawyers are still billing only 2.3 hours per day, and are spending 48% of their time on billing and administrative tasks. Read the full report for more insights.

Download the Legal Trends Report

# 5 exceptional customers recognized at The Reismans

This year, we kicked off The Reismans, the first annual recognition of Clio users who demonstrate excellence in one of the following categories: innovation, community work, growth, and best new law firm. This recognition program is named after Catherine Reisman, Clio's very first customer.

We're so incredibly proud to work with all of the lawyers and legal professionals who choose Clio, and it was an honor to showcase just a few of their stories this year.

From technology advocates fighting for work-life balance for busy lawyers, to community champions fighting for fair representation for LGBTQ clients, there were plenty of inspiring stories to take in. See the stories of our winners here.

# 3.7 million matters created

For the over 150,000 legal professionals using Clio, it's been a busy year. In addition to creating 3.7 million matters, together in 2017 we:

- Added 8 million contacts
- Created 22.6 million documents
- Tracked 33.6 million billable hours

That's an impressive amount of work done by (in our opinion) the most driven and dedicated lawyers and legal professionals in the world.

# Over $6 million donated

Every year, Clio donates over $6 million in free Clio access to 100,000 users at over 150 law schools, clinics, and other legal programs. With this access, organizations like the California Innocence Project are changing lives.

Additionally in 2017, Clio:

- Provided free access to Clio for law firms affected by Hurricane Harvey and Hurricane Irma.
- Provided free access to Clio to support access to justice efforts by lawyers' working pro bono on immigration cases in the U.S. earlier this year.

- Helped raise $25,000 together with the legal community for the American Red Cross' disaster relief efforts by kicking off a fundraiser at this year's ClioCon.

## 10 awards and recognitions received

Clio doesn't just provide the best practice management software available—it has an award-winning culture that gets recognized every year by various organizations. This year, we're proud to share some of the awards and recognitions we've received:

- Named one of Deloitte's 2017 Technology Fast 500™, which recognizes the 500 fastest growing technology, media, telecommunications, life sciences, and energy tech companies in North America.
- Recognized as one of Canada's Top Small & Medium Employers by Mediacorp.
- Awarded Best Contact Center Culture by the International Customer Management Institute (ICMI).
- Named one of 2017's Top 20 Most Innovative Technology Companies by the Canadian Innovation Exchange (CIX).
- Clio's Data Operations Team named Team of the Year at the BCTech 2017 Technology Impact Awards.
- Named as one of 10 finalists in QuickBooks Connect's Small Business App Showdown.

Additionally, Clio CEO Jack Newton was named one of Business in Vancouver's Top 40 under 40, and was named EY's Software-as-a-Service Entrepreneur of the Year for 2017!

## 62 Clions added

Over the course of 2017, our team grew from 185 to 247 Clions around the world. We welcomed new members to our Product, Customer Success, Customer Support, Employee Experience, Finance, Marketing, and Sales teams, and we can't wait to continue growing in 2018!

We're looking for amazing people to join our teams in Vancouver, Toronto, and Dublin to help us transform the practice of law, for good. Here are the roles we're hiring for right now.

## Thanks for joining us in 2017!

To our customers, our partners, our ClioCon speakers and attendees, and everyone else in the legal community we've been able to work with this year, thank you for your trust and support.

We're on a mission to transform the practice of law, for good. Your dedication to your profession is a key part of that, and we're excited for what we'll accomplish together in 2018.

*Launch//Code Abbreviated Rules. For Official Rules, please visit clio.com/launch-code.

NO PURCHASE NECESSARY. Purchasing does not improve your chances of winning. The Launch//Code Contest is not open to the general public or to persons in their individual capacity. The Contest is open to companies/businesses legally organized as a sole proprietorship, partnership, limited liability company, corporation or otherwise which are located and doing business within the 50 United States, including the District of Columbia, and Canada (excluding Quebec). Void in Quebec, Puerto Rico, Guam, the U.S. Virgin Islands, outside the U.S., and wherever else prohibited by law. Contest begins at 12:00:01 AM ET on 09/25/17 and ends at 11:59:59 PM ET on 07/31/18. Click here for Official Rules. Sponsor: Themis Solutions Inc. d/b/a Clio, 4611 Canada Way, Burnaby, BC V5G 4X3.

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## 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.