Tips to Elevate Your Billing in Clio

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> "My accounts receivable is the lowest it has ever been in my 27 years of practice, and I haven't had to institute collections actions against any clients this year. – Jodi Donato, Donato Law"

In the fast-paced environment of law, staying on top of billing best practices isn't just beneficial; it's essential for building trust with your clients, improving your realization rate and cash flow, and growing your practice. We understand how critical the billing stage is for law firms and have invested in developing intuitive solutions that help law firms like yours simplify and better manage your billing process. By adopting these practices in Clio, you can ensure your billing is not only efficient but also accurate, transparent, and client-friendly. Here's how to make the most out of Clio's billing features, setting your practice up for success.

Bill More Efficiently

> "Before Clio, it took 3 hours a month to do our billing—and it was tedious and lawyers hated it. Now, with Clio, it's easy, it's efficient, it takes 45 minutes, and people get it done on time." – Angela Lennon, Koenig | Dunne"

Inefficient billing workflows can be a burden on busy law firms, eating up hours every month that could be spent serving or acquiring more clients. These features are tailored to improve the efficiency of your billing process from start to finish:

Leverage Bill Message Templates: Create customized messaging for bill sharing, unpaid bill reminders, trust requests, and outstanding balances (by default), plus set up to 20 more templates for other unique situations as needed. By using bill message templates, you can easily customize your billing messages and subject lines with fields such as the client name, matter name, and outstanding amounts, ensuring clients receive invoices they won't ignore. You can view and edit your bill messaging templates here.

Automate reminders and collections: After your bills have been generated and shared with clients, following up with clients for payment can be a laborious and time-consuming task for law firm staff. By enabling automated reminders for unpaid bills, you can ensure clients are receiving follow-up for their outstanding balances that go unpaid. Specify the schedule for follow-up—the timeframe in which a reminder should be generated if a bill remains unpaid. You can also specify if just one reminder should be sent, or if reminders should be continually sent (i.e., every 15 days) until a bill is paid. If you have Clio Payments enabled, you can also set up payment plans to help customers pay down outstanding balances gradually on a schedule that works for both you and your client.

Generate bills in bulk: For firms that handle multiple cases simultaneously, Clio's bulk billing feature is a game-changer. Generate multiple bills in a fraction of the time it would take to create them individually, significantly speeding up your billing process. Considering almost one in three legal professionals agree that their firm takes too long to get bills out to clients, and less than half would say they bill in a timely fashion, it's beneficial for law firms to use the bulk billing feature to quickly and easily generate client bills. According to the *2023 Legal Trends Report*, law firms using bulk billing have realization rates that are 21% higher than firms not using the feature (94% compared to 78%).

Simplify Your Time and Expense Tracking

Billing practices start with how you track time and expenses. Keeping accurate and descriptive activity entries can help your clients better understand what they're being billed for, making them more likely to pay and less likely to dispute or question any charges. Clio's time tracking functionalities are designed to capture every billable minute or expense with precision and ease. To kickstart your path to optimal time and expense tracking, try these practices:

Use the Time Keeper button: Clio's timer function makes it easy to track time while you work on different tasks and matters. With one click from any page, you can start and stop the timer to log time, ensuring your work is accounted for. Putting off this task only invites increased risk of inaccurate records, less specificity, and ends up costing you more time to input.

Create time entries from tasks or calendar events: Another way to track time is by creating time entries directly from tasks on your task list or calendar events on the calendar view.

To generate time entries from tasks

1. Navigate to the Tasks tab

2. Click the dropdown arrow next to the task you want to add time for and click ‘Add Time’
3. Enter the duration and activity category for the task. The matter, description, and date should be auto-populated from the details added when the task was created

To generate time entries from calendar events

1. Navigate to the Calendar tab
2. Click the calendar event and select ‘Add time’
3. Enter the activity category for the task. The duration, matter, description, and date should be auto-populated from the details added when creating the event

Use mobile entries: Leverage Clio’s mobile app to record time entries from anywhere. Whether you’re in court, at a client meeting, or working remotely, the ability to track time or enter expenses from anywhere ensures no billable activity slips through the cracks.

Create Activity Categories: Activity categories can help law firms create common labels for events firm members frequently track, eliminating the need to enter them manually each time. Examples of time entry categories are ‘Call with client’, ‘Court appearance’, ‘Document preparation’, etc. For a list of common activity categories for time and expenses entries, see here.

Practice consistency: Make it a habit to enter your time and expenses daily. This routine minimizes the risk of forgetting billable hours and provides a more accurate overview of your workload and productivity.

Did you know?

Billing and accounting is the top area in which firms with good revenue are using technology to support.

Improve Communication and Transparency

Clear communication and transparency are the bedrocks of trust in any attorney-client relationship. Detailed bills can start your clients off with a better understanding of the services you’re providing to ensure expectations are met or exceeded. Offering a dedicated channel for you to share bills with clients provides them with timely responses to any questions they might have and can also go a long way towards leaving your client with a positive lasting impression of your firm. Positive lasting impressions can also increase the likelihood of referrals or repeat business.

Provide detailed bills: Create bills that are not only professional but also comprehensive. Detailed descriptions of services, alongside itemized expenses, help clients understand exactly what they're being charged for, reducing questions and disputes. It's also possible to designate time entries as 'non-billable' so that clients have full visibility into the work being performed on their matter, and any value you provided but did not charge for.

Leverage Text Snippets: Clio's Text Snippets are helpful abbreviations for commonly used phrases that you can use throughout Clio to automatically fill in text. Clio has a library of them already or you can create your own. Clio's Text Snippets are abbreviations or shortkeys that can fill a text field in Clio with a detailed message when the shortkey is entered. For example, creating a text snippet for 'cco' could create a detailed description like 'Client Consultation – 30 minutes – in office'. Creating these in advance allows time-strapped lawyers to provide exceptional detail on client invoices, while saving time and limiting typing errors.

Use Clio for Clients: Clio for Clients, our secure portal for sharing bills, messages, and documents with your clients, is a resource for communicating with clients either via a web interface or a mobile app. Share multiple bills at once with clients via Clio for Clients from the Billing tab to send all outstanding invoices to clients within seconds.

Simplify Client Payments with Clio

In this day and age, offering convenient and flexible online and in-person payment options is expected from clients. Clio Payments, integrated directly within your billing and case management system, facilitates smooth, secure transactions while providing a smooth client experience. It also facilitates prompt payments. In fact, firms that collect 75% or more of their payments online collect half of their bills within three days of issuing them—five times faster than firms that don't collect electronic payments at all.

Provide payment links: This allows clients to pay their bills or trust requests immediately upon clicking the secure payment link. Having a link available to your clients alongside their bill can dramatically improve payment time. Firms using Clio Payments can also generate and download QR codes that can be added to an email or even uploaded to your law firm website for clients to easily scan and pay.

Store payment methods: With Clio Payments, you have the ability to request and store preferred client payment methods for future bills or trust requests. With a stored payment method, you'll have the ability to charge a client's preferred debit card, credit card, or eCheck, removing any delays on payment and making follow-up unnecessary.

Could your firm benefit from Clio Payments? Book a free consult with us to learn more.

Implementing New Practices

Adopting new practices requires a thoughtful approach. Start by evaluating your current billing processes to identify areas for improvement. Implement those changes gradually, allowing your team time and space to adjust to achieve billing consistency. Training and continuous support are vital, ensuring everyone is leveraging Clio's features to their full potential.

Continuous Improvement

The legal industry and technology are ever-evolving, and so should your billing practices. Stay informed about updates and new features from Clio. Regularly reviewing your billing processes and seeking feedback from your clients and team can uncover opportunities for further efficiencies and enhancements.

Final Thoughts

Efficient, transparent, and client-friendly billing isn't just a goal; it's within reach with Clio. By integrating these best practices into your daily routines, you can improve your firm's financial health, enhance client satisfaction, and reclaim valuable time. Let Clio handle the complexities of billing, so you can focus on what you do best—practicing law. Embrace the innovation Clio offers, and watch your practice thrive in productivity and profitability.

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.