

# The global leader in cloud-based legal technology

Discover why 1,000+ mid-sized firms consider Clio the gold standard.





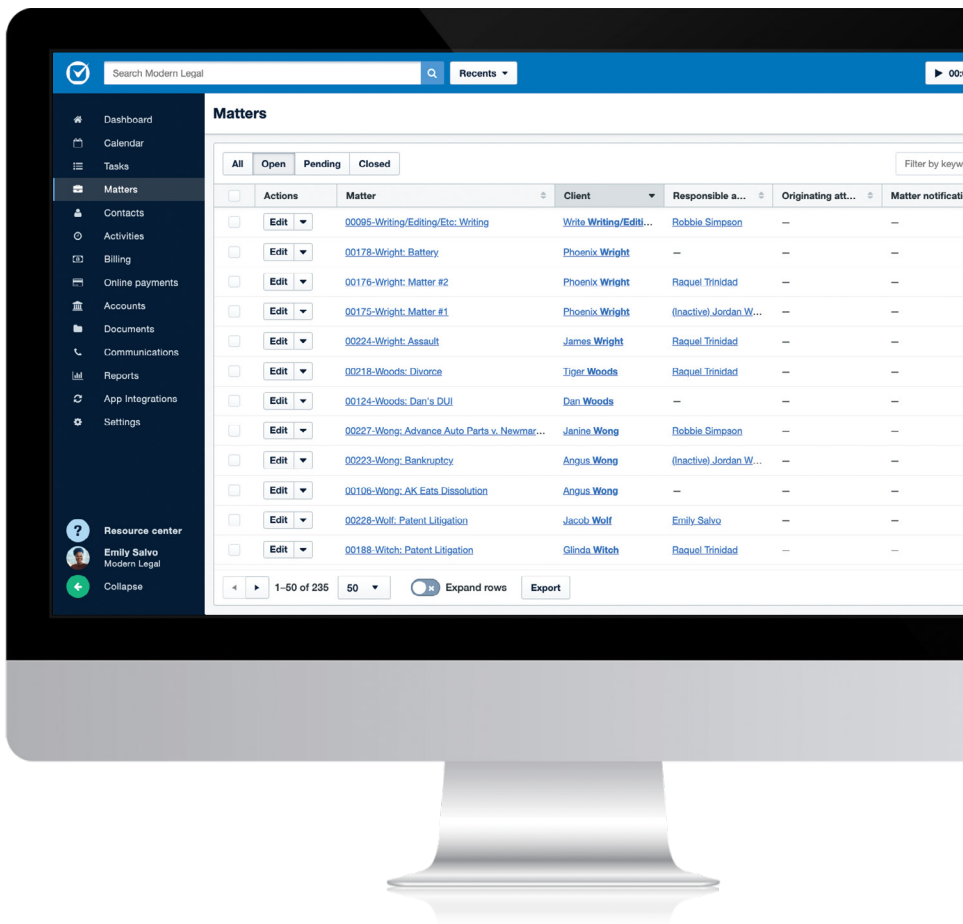
We chose Clio  
because, honestly,  
it's been around the  
longest, and it's the  
most developed  
solution available.

**CORY SPRUNGER**

Managing Attorney/ Partner,  
Sprunger and Sprunger

# Improve Operations

Create a better experience for your staff and clients—with Clio.



# Improve Operations

## Onboard new clients faster

Speed up your client intake process and bring on potential clients faster, with fewer errors. Clio's online intake forms save staff from manually inputting information. And automated follow-up emails and reminders ensure quick responses.

## Make it easy to work on documents

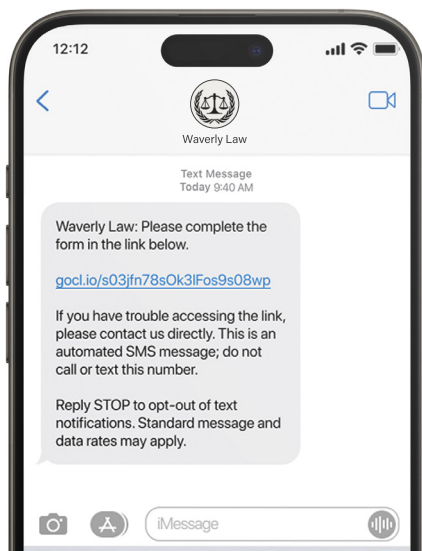
Clio's document management functionality helps reduce printing and document storage costs—and makes it easy to find, edit, and share legal documents. Or integrate Clio with your favorite document management system, like NetDocuments, for a streamlined flow.

## Remove duplication of work

Eliminate app switching and duplicate data entry by connecting Clio's core solution with your favorite tools. Choose from over 250 integrations, from basics like email and video conferencing, to specific solutions for legal research or docketing.

## Eliminate unnecessary back-and-forth with clients

Automate client communications and give clients up-to-date information on their legal matters through Clio's client portal. Plus, set up automatic reminders for upcoming meetings and overdue bills.

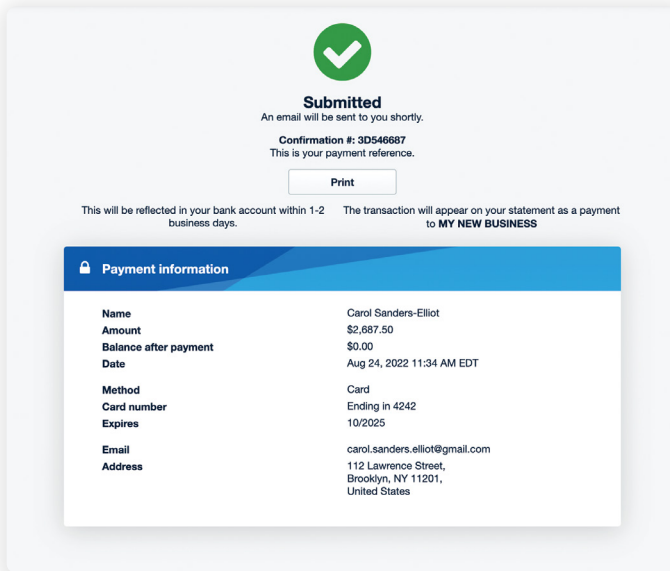


## Enable your staff to work on the go

All Clio products are cloud-based, enabling your team and clients to securely access their cases from anywhere.

## Get paid faster

Reduce the amount of time it takes to get paid and create a better billing and payment experience for your clients. Clio streamlines invoicing, trust requests, and payment collection in compliance with trust accounting rules.



Clio streamlines our office. It's the piece of the puzzle that helps us to fit together. Everybody uses Clio in a different way, but Clio is the central component that connects all of our locations and all of our employees.

**KIMBERLY MULLINAX** | General Manager, King Law



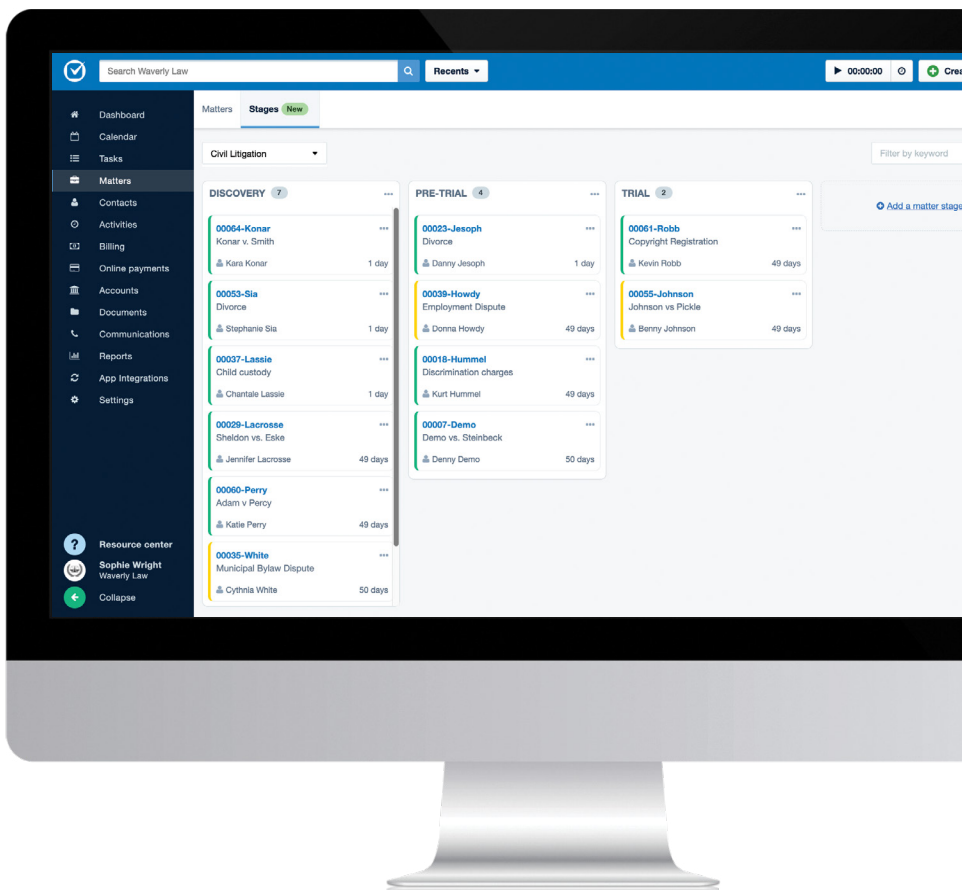
Once we partnered with Clio, it immediately put us all on the same page across multiple locations, and the results have been incredible. Clio turned us from a \$4-million firm to a \$15-million firm in four years.

**BRIAN KING**

Founder and Managing Partner, King Law

# Enhance Productivity

Remove barriers and create  
efficiencies with Clío.



# Enhance Productivity

## Improve collaboration at your firm

Don't let your firm fall behind on tasks because someone is on vacation, or has too much on their plate. Assign tasks to firm members or outside parties through Clio's secure co-counsel portal.

## Maximize billable hours

Provide your staff with a time tracker that works from anywhere, at any time. Clio allows users to add time entries directly from calendar events, inbox, tasks, documents, and more.

The screenshot shows a 'New time entry' modal window. It contains the following fields and options:

- Duration:** 1h (with a play button and 00:00:00)
- Matter:** 07838-Doherty:Estate planning review
- Activity category:** Meetings (dropdown)
- UTBMS task code:** Find a UTBMS code (dropdown)
- Description:** Reviewed Will with Janet Doherty (text area)
- Date:** 2023-12-19 (calendar icon)
- Firm user:** Meghan Deutscher (dropdown)
- Rate:** 300.00 / hr (with 'Custom rate' label)
- Non-billable
- Show this entry on the bill

At the bottom, there are four buttons: 'Save entry', 'Save and create another', 'Save and duplicate', and 'Cancel'.



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



## Hit every deadline, every time

Stay on top of filing deadlines, case milestones, court dates, and more by using Clio to automatically create events based on rules and deadlines from hundreds of U.S. courts. Plus, set up reminders to ensure a meeting or deadline is never missed.

## Automate repetitive manual tasks

From matter creation to document templates and bill reminders, Clio can simplify routine, day-to-day tasks for staff while automatically keeping relevant members across your firm informed on progress.

Actions	Task list	Practice area	Number of ta...
<a href="#">View</a>	<a href="#">(Family) Pre-Trial</a>	Family	4
<a href="#">View</a>	<a href="#">Applying for residency</a> Supporting the client with resources for a residency application	Immigration	2
<a href="#">View</a>	<a href="#">Helen (Family) Pre-Trial</a>	Family	3
<a href="#">View</a>	<a href="#">Initial Interview</a>	Civil Litigation	11
<a href="#">View</a>	<a href="#">Investigation / Discovery</a>	Criminal	6
<a href="#">View</a>	<a href="#">Plea Negotiation</a>	Criminal	3
<a href="#">View</a>	<a href="#">Pre-Trial</a>	Criminal	3
<a href="#">View</a>	<a href="#">Preliminary Hearing</a>	Criminal	3
<a href="#">View</a>	<a href="#">Traffic Matter</a>	Criminal	8
<a href="#">View</a>	<a href="#">Trial</a>	Criminal	5



Our clients and our team members are less burnt out. We can support one another. We've reduced our working hours and we haven't missed a beat because Clio's made us more efficient and productive.

**ANGELA LENNON** | Partner, KoenigDunne



I get the most benefit from Clio's reporting tool. [We pull] a lot of data from it, and there's huge value in being able to analyze what's going on in real-time.

**DAVID CRUM**

Attorney and CEO, US Legal Groups

# Increase Visibility

Take the guesswork out of running  
a profitable firm with Clio.



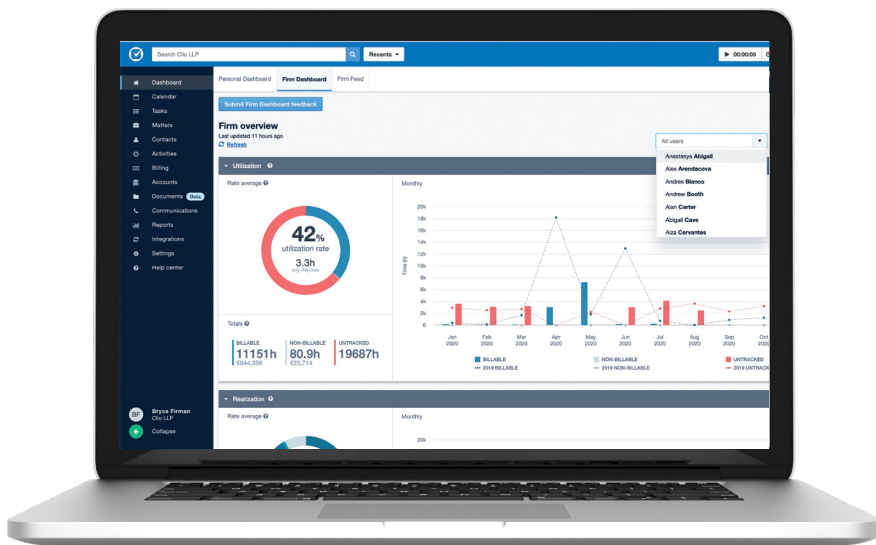
# Increase Visibility

## Predict resourcing needs and case budgets

Add time estimates to tasks so you can forecast the amount of work needed for a legal case. Track estimates against actual time worked to better predict legal budgets for clients.

## Make data-driven decisions

Access individual, firm, and financial performance reports in real time to identify opportunities for improving efficiency, productivity, and revenue.

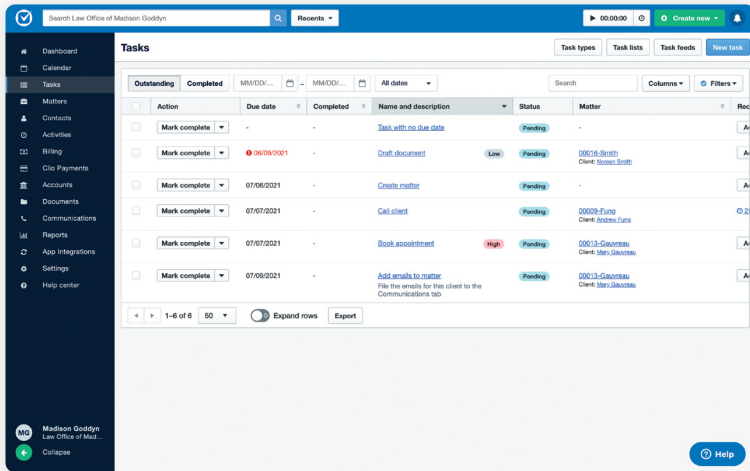


Clio has streamlined our firm's calendaring system, enabling our attorneys to stay ahead of scheduling and be aware of who is covering the various upcoming hearings and meetings. It is also accessible to the entire office, whether employees are working remotely or traveling!

**CAROL EASTON** | Legal Assistant, Booth LLP

## Monitor case progression

Keep a pulse on all tasks associated with a legal matter, organized by due date, enabling your team to quickly identify upcoming and overdue tasks.



## Provide the right access to the right people

Ensure your staff members have only the necessary level of access and visibility needed to get their work done. Control who sees what information by assigning user roles and permissions.

## Improve staff onboarding and offboarding

Make it easy for your staff to hand over tasks, share information about ongoing cases, and ramp up on upcoming casework with Clio's intuitive workflows, on-demand training materials, and task management capabilities.

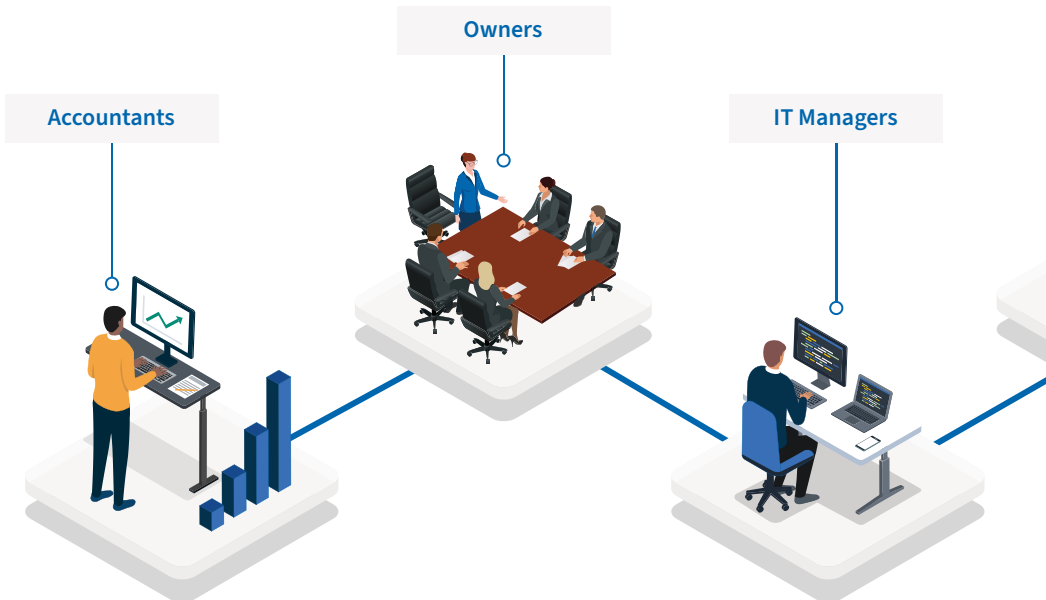


Clio makes it incredibly easy to keep track of tasks and deadlines for our cases. The easy-to-use design is simple to train new employees on and is very intuitive. We utilize the case notes and tasks on a daily basis to keep track of who is working on a case and any progress that everyone on the team needs to be aware of.

**AMANDA HEALY** | Case Coordinator, Wiggam & Geer LLC

# Legal software your entire firm can agree on

- Billing & Payments
- Case Management
- Client Intake
- Client Management
- Communications
- Document Automation
- Document Management
- Firm Marketing
- Legal Calendaring
- Medical Record Management
- Reporting and Insights
- Settlement Management
- Task Management
- Time & Expense Tracking
- ...and more



## Work reliably and securely from anywhere

Clio provides a financially-backed 99.9% uptime guarantee, along with data security protocols that go beyond industry requirements for professional compliance.



## Connect with the tools you're already using

Make Clio your central source of truth by tapping into powerful integrations with the legal industry's most popular apps.



## Get help through your transition

Clio is a partner invested in your success. From consultation through to onboarding, our solutions engineering and data migrations teams will get you set up for success.



## Get support, when and how you need it

Clio provides the people behind the software. Leverage expert assistance from an in-house team of support representatives, available 24 hours a day, five days a week.



Scan the code to learn how Clio can support every member of your team.



# Invested in your success

At Clio, we are deeply invested in understanding and addressing the unique needs of mid-sized and large law firms. We recognize the challenges you face and are committed to providing the tools and support necessary for your growth and success.

We have dedicated resources to enhance the security, reliability, and usability of our software, ensuring that you can trust Clio as your central technology solution. Moreover, we also offer comprehensive training and support to ensure that you get the most out of Clio and achieve your business objectives.

You can be confident that we will continue to invest in your success. With Clio as your partner, your firm will thrive in the ever-changing legal landscape, with:

- Continued product innovations and offerings
- Tailored support and training
- Educational resources and legal trends insights designed for mid-sized firms

Join over 1,000 successful mid-sized firms and experience the Clio difference firsthand.



Jack Newton  
Founder and CEO of Clio

## Ready to learn more?

Visit [clio.com/enterprise](https://clio.com/enterprise) | [sales@clio.com](mailto:sales@clio.com)

1-888-858-2546 EXT. 1

