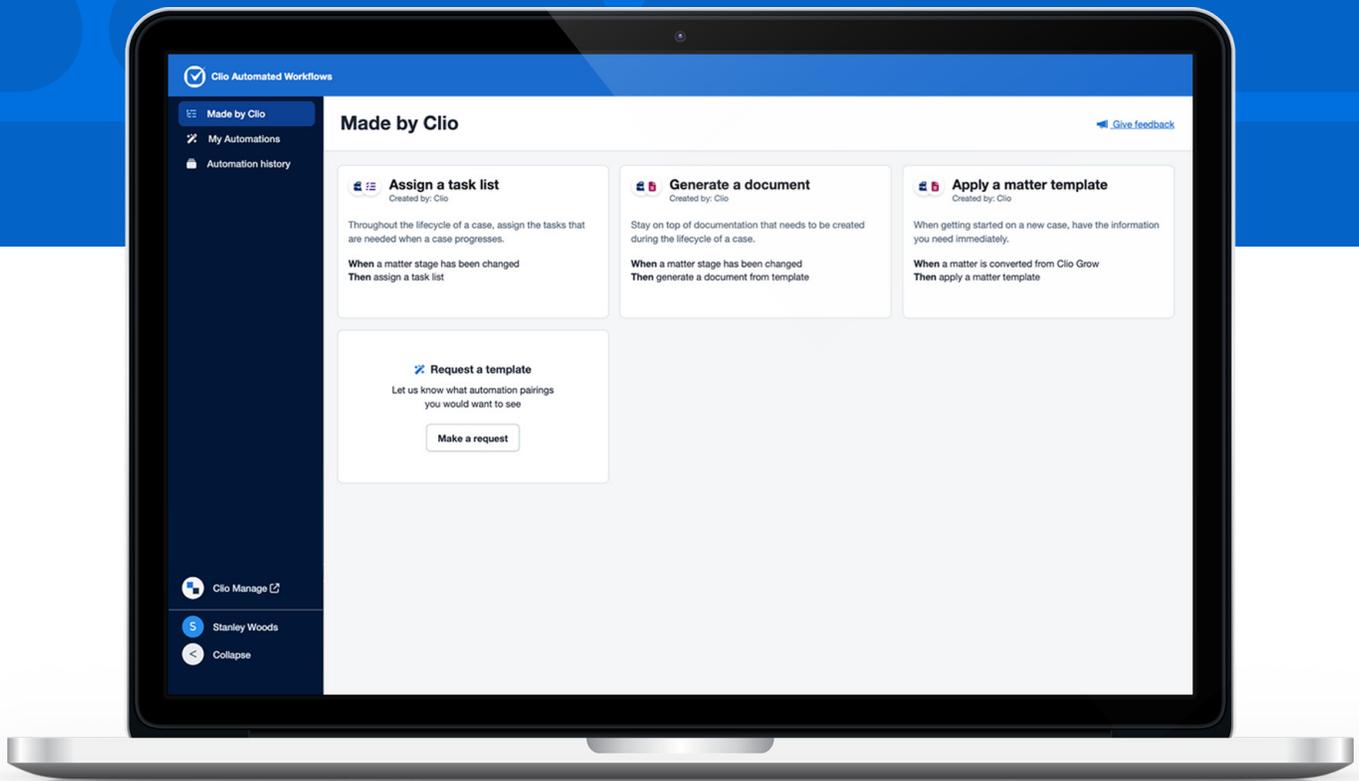# Automated Workflows Best Practices Guide

Automated Workflows

Automate repetitive tasks as cases progress through key milestones to ensure critical steps and deadlines are never missed. With ready-to-use templates, quickly set up automations so you can start managing your cases more efficiently from the start.

Automated Update in Clio Manage is included on the Advanced and Complete plans.

> **"** I love that I can automate tasks I used to do manually. It helps me get things done faster and also takes care of tasks I often forget.
>
> **Jennifer Smith**, Pacific Elder Law

Here's how your firm can benefit from automating your workflows:

- **Never miss a deadline.** Tasks are automatically assigned as cases move through each matter stage, so you won't need to track them manually.

- **Minimize data entry errors.** Apply matter templates, assign task lists, and generate documents automatically with accurate and up-to-date information as cases progress.

- **Tailor processes for your practice.** Set up workflows by practice area to keep matter templates, tasks, and documents consistent across cases.
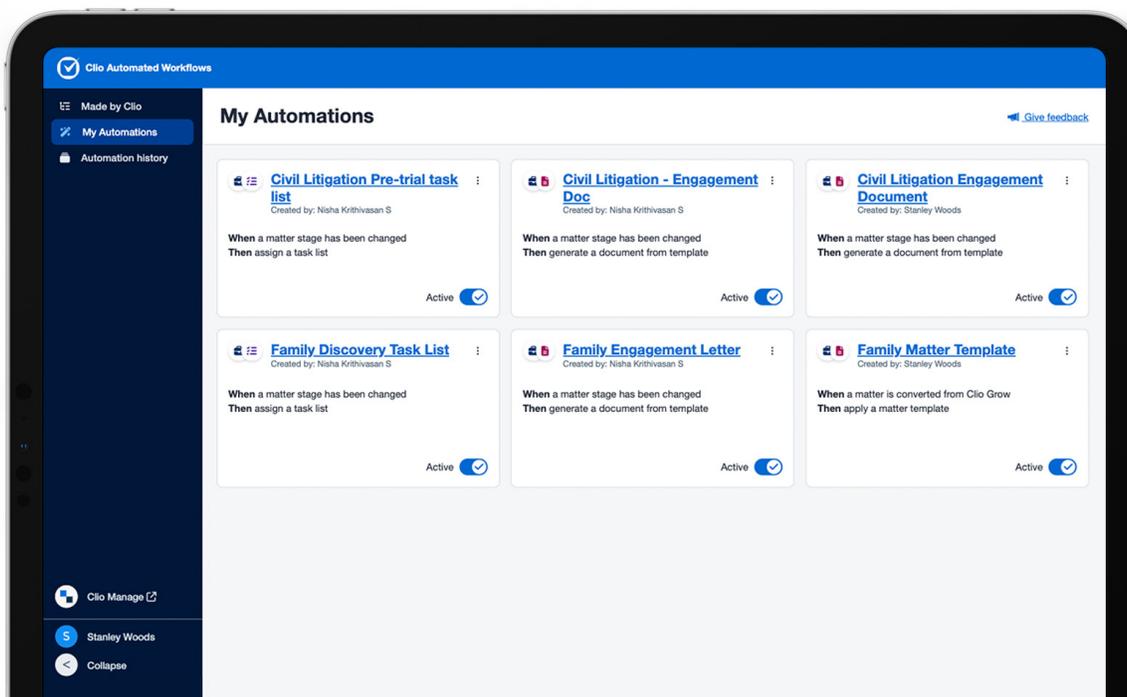
Getting Started

Before you get started, <u>assign a practice area</u> to all of your matters. Then you can set up any of the following automations:

Step 1

<u>Assign a task list</u>. Before creating this automation, set up <u>matter stages</u> to reflect the actual flow of your cases and <u>create task lists</u>. Then you can automatically assign task lists as your case progresses through stages.

Step 2

<u>Generate a document</u>. Once your <u>matter stages</u> and <u>document templates</u> have been created, you can auto-generate documents from templates when a matter advances to the next stage.

Step 3

<u>Apply a matter template</u>. If you're using Clio Grow, <u>set up matter templates</u> to ensure cases are set up with the right details from the start. You can then automatically apply matter templates when cases move from Clio Grow to Clio Manage.

Best Practices

Regularly review and update matter stages. Periodically review your matter stages to ensure they align with how your cases progress in your practice, helping keep work moving forward efficiently.

Assign tasks to specific roles. If unsure who should complete a task, assign it to a responsible attorney, originating attorney, or a responsible staff member like a paralegal or case manager.

Maintain matter templates. If using Clio Grow, regularly review and update your matter templates to ensure they contain accurate details, task lists, and folder structures, so new matters are set up correctly from the start.

Audit automation history regularly. Periodically review your automation history to ensure your workflows are running as expected. You can also delete or rename automations.

Pro Tip

When assigning tasks in a workflow, check that the designated users have matter access at the time the task is triggered to ensure the tasks appear on their list.

See how this trial attorney assigns the right tasks at the right time.

> "
>
> The most impactful part of automated workflows is the ability to trigger a task list after each change in matter stage. This lets us tailor the case journey and avoid assigning irrelevant tasks throughout the lifecycle of the case. You also don't end up with hundreds of overdue tasks when cases don't move through stages.

Alyssa Enzor Baxley
Founding Partner, Baxley Maniscalco

Want more tips? Here are some helpful resources:

Join the community
Connect with other legal professionals using Clio through our forum.

Power up with Clio
Join us in a monthly webinar diving into best practices.

See what's new
Join our quarterly webinar featuring our latest product updates.

Have questions?
Visit the Help Center or contact customer support at 1-888-858-2546.