

CLIO BUYER'S GUIDE

The leading legal practice management software

Run your firm, organise matters
and collaborate with clients—
all from one place.



More than 150,000 legal professionals use Clio, the world's leading cloud-based legal software, to run more successful legal practices centered on better, more efficient client experiences.



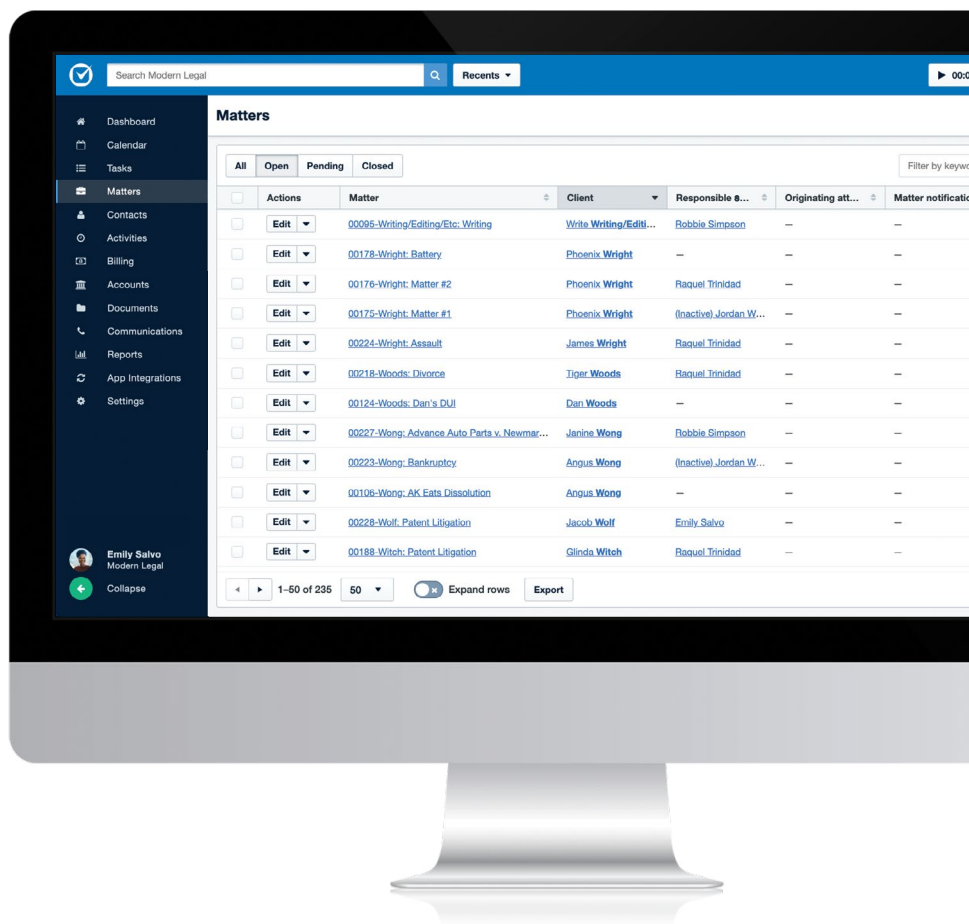
Compared to other softwares, Clio was fresh, simple, and got the work done. It was also cost-effective and had all of the features we needed—billing, task management, communications, and it linked with other apps.

NARIN XAVIER DE SAINI

Director at Ascenta Corporate & Commercial Law

Clio Manage

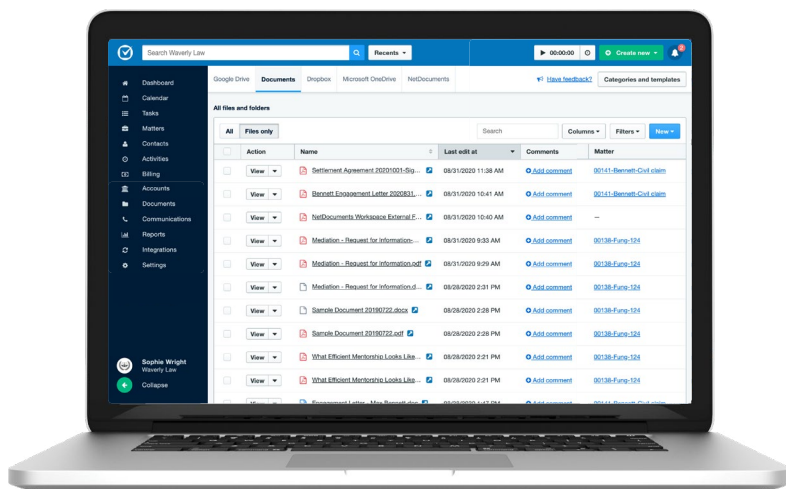
Connect everyone and everything across your firm.



Clio Manage

Centralised document storage and management

Keep all of your documents in one place—and easily locate what you need anytime. Store unlimited documents in the cloud, link them to your matters, and send them out for e-signatures, all from your Clio dashboard. Then move on to your next task by searching for and locating the next document in seconds.



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

Easy billing for law firms

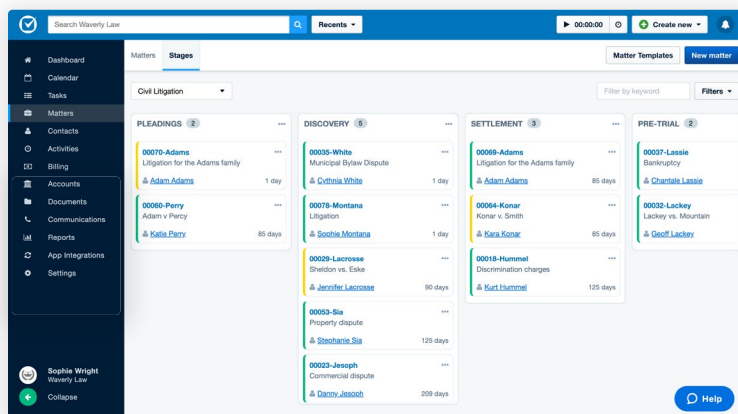
Streamline your billing with Clio's billing workflow—from accurate time tracking, to beautifully customisable invoices. Take end-of-month billing from days to minutes and ensure you get paid faster with Clio.

Take back your time

Automate your most time-consuming work. From time and task tracking to document creation and collaboration, Clio simplifies routine, day-to-day tasks. At a glance, relevant members at your firm can see matter progress and action the most important next steps.

Deliver meaningful client experiences

Earn trust by keeping clients up to speed on their case at all times with Clio's built-in communication suite. Offer your clients a convenient mobile app to securely share documents, bill clients, and communicate on the go.



Discover a better way to work with the tools you want

Seamlessly connect the tools you're already using in one centralised workspace. Clio integrates with many of the legal industry's most popular apps, including, your preferred email and video conferencing.

Clio Payments: Streamlined Payment Processing

Clio Payments, included in Clio Manage, simplifies the way clients and law firms manage payments, making it more convenient and flexible than ever.

- Payment methods: Clio Payments supports debit, credit, prepaid cards, bank transfers, Apple Pay and Google Pay.
- Faster transactions: Secure links and QR codes reduce billing-to-payment delays.
- Effortless payments: Simplify one-time and recurring transactions.
- Auto-reminders: Streamline payments, reducing administrative burdens.



SARA GIAMPA KEASE, STUDIO LEGAL

I absolutely love this function in Clio, it is by far my favourite function! Clio payments has really made a massive difference to our accounts payable processes. Offering our clients a pay now button when they receive their invoices, means there are less obstacles to make payment and in turn less admin for us, when following up overdue accounts (and less overdue accounts in general). Previously a client would have to ask for a payment link which we would then have to retrieve from Xero and share with them, it was a convoluted process, and we are glad we can now offer this function to our clients.



To learn more about Clio Payments visit clio.com/au/features/payments or scan the QR code



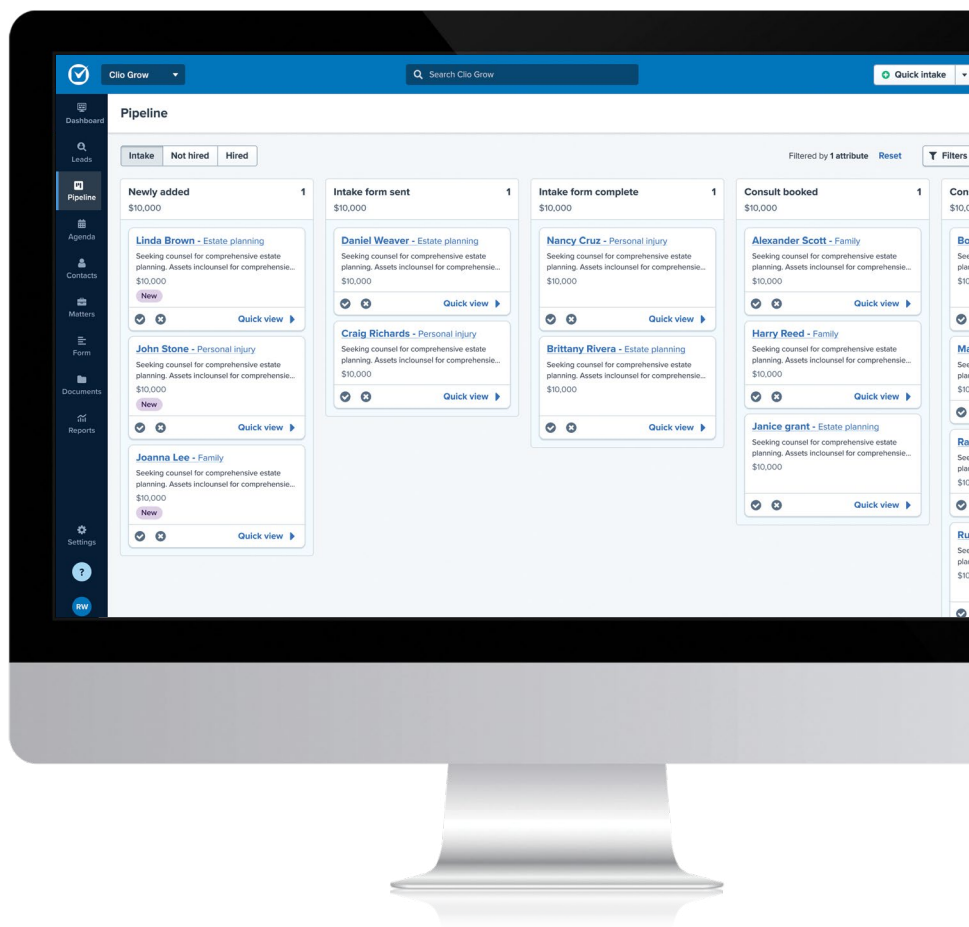
We use Clio Grow for all our lead management. There is no better practice management software than Clio, with the ability to track lead generation and thousands of people coming into the pipeline.

IAN ALDRIDGE

Founder, Progressive Legal

Clio Grow

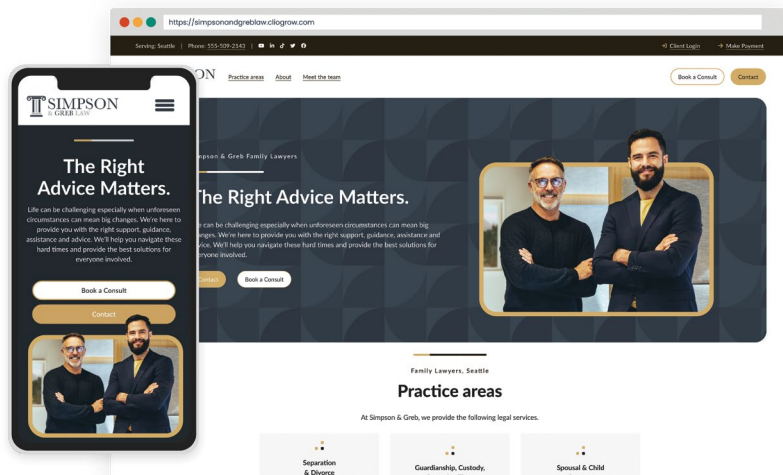
Organise your intake process



Clio Grow

Attract and win new clients online

As more clients search for legal services online, your firm's web presence is more important than ever. Make your firm stand out and impress new clients with a professional website and make it easy to get in touch with online appointment booking.



Automate manual tasks

Bring on new clients with less data entry and fewer errors. Online intake forms help you collect prospective client information in a central place and save you from manually entering information. Automatically generate agreements and use follow-up emails and reminders to keep tasks on track.

Deliver a consistent client experience

Standardise your client intake process from first contact to signing a retainer. With Clio Grow, you can see where potential new clients are in the intake process from a single dashboard, and automate next steps to ensure you're delivering a consistent client experience every step of the way.

Capitalise on every opportunity

Clio Grow collects detailed information on how potential clients discover your firm and their projected case value, to help you identify where you're generating the most revenue and how to adjust your business strategies to maximise results.

The screenshot displays the Clio Grow interface for a matter titled "Estate Planning (Bob Johnson)". The interface is divided into several sections:

- Matter Details:** Includes fields for Type (Lead), Assigned to (Adam La France), Created on (July 4, 2019), Created by (Adam La France), Description (N/A), Location (N/A), and Value (N/A). There is an option to "Add a custom field".
- Contacts:** Lists "Bob Johnson" with fields for Type (Lead), Source (Lead), and Created on (July 4, 2019). There is an option to "Add a referral relationship".
- Intake process:** Includes tabs for Notes, Emails, Files, and Timeline. It features a section for "Add single item" (Create a task, appointment, email, etc.) and "Add a workflow" (Add a checklist, automation, or campaign).
- Automated workflows:** Shows a "General intake flow" with a progress bar. The workflow is divided into three stages:
 - Completed (1):** Includes "Email sent - Updated welcome email" (Sent on: 01/02/2023 at 3:10 pm) and "Form submitted - General Intake Form" (Submitted on: 01/02/2023 at 3:10 pm).
 - In progress:** Includes "Task assigned - Review intake form submission and determine if consultation is needed" (Assigned to: Janet Scott - Due: 01/02/2023 at 3:10pm).
 - Up next:** Includes "Appointment - 30 Minute Consultation with Rebecca Pearson", "Status update - Pending engagement", and "Task - Do final checks and convert matter to Manage" (Assigned to: Janet Scott).
- Checklists:** Shows a progress bar indicating "2/5 complete".

Automated workflows in Clio Grow give you visibility of the entire client intake journey.



I've been able to reduce my consultations from 30 minutes to 10 or 12 minutes. It saves time for my clients, and they really like the streamlined process.

VERNON BROWNLEE

Attorney and Business Owner, Law Office of Vernon Brownlee



THE LAW SOCIETY
OF NEW SOUTH WALES

Clio Trust Accounting: Law Society Certified

Clio's trust accounting software has been
certified by the Law Society of New South Wales
as being compliant with the Legal Profession
Uniform General Rules 2015.

Getting started with Clio is simple

Transition with ease

Our team will help bring your information into Clio and get you set up in a way that works for your firm.

Learn your way

Get up to speed with live training sessions, guided onboarding, and a complete library of resources.

Answers at hand

Our team of experts is ready to help 24/5 by phone, email, and live chat. Or, visit our online help center.

Ready to learn more?

Visit clio.com/au | sales.apac@clio.com | (+61) 1-800-122-546

Find a plan that's right for your firm

EasyStart	Essentials	Advanced	Complete
Track your time and get paid.	Centralize the way you work and connect with clients.	Maximize productivity and improve business intelligence.	Get everything you need to run your firm, from intake to settlement.

Get started for free with a 7 day trial. No credit card required. Visit clio.com/au/signup/.

For pricing information, visit clio.com/au/pricing

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