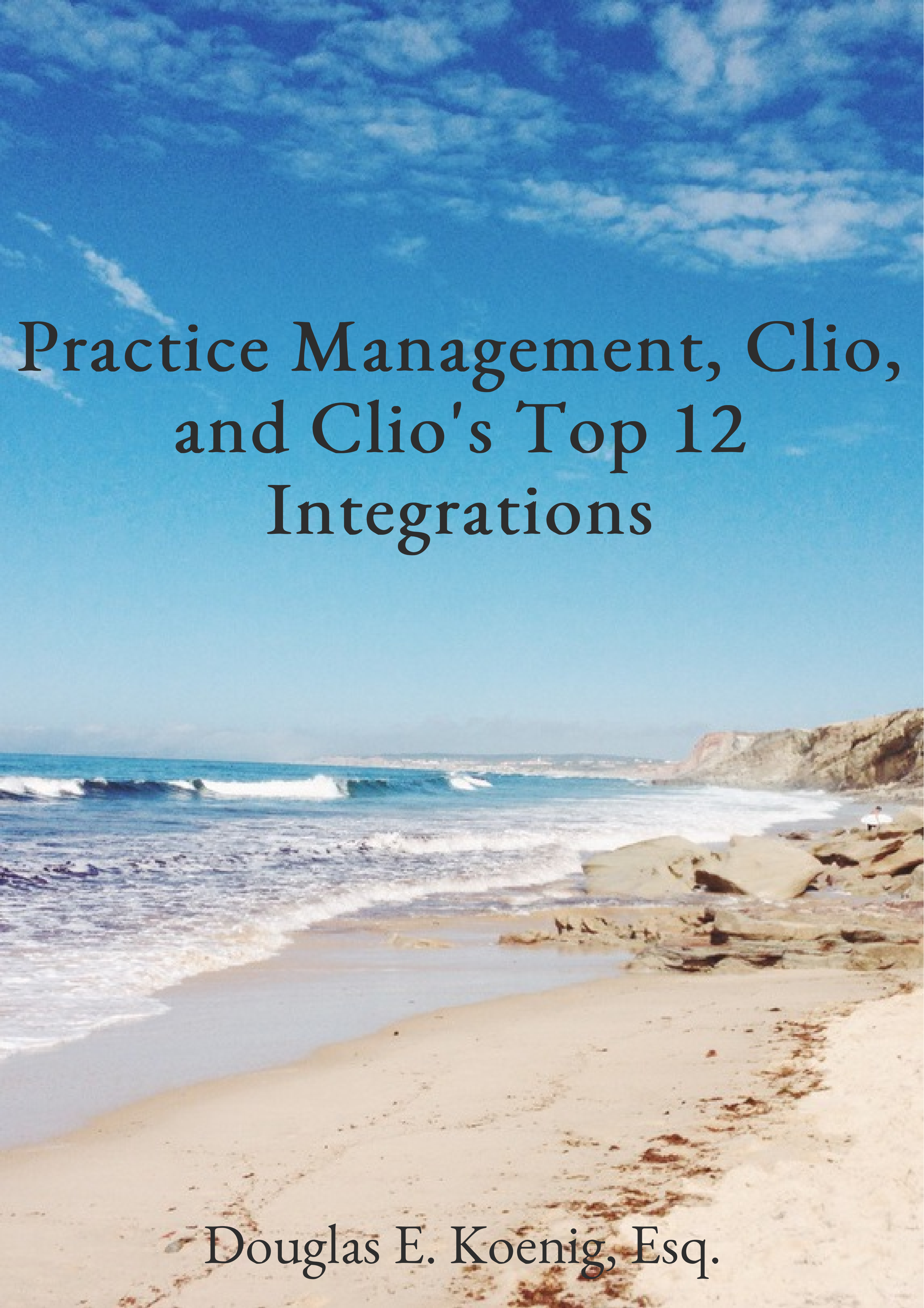

Practice Management, Clio, and Clio's Top 12 Integrations

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Practice Management, Clio, and the Top 12 Clio Integrations

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We look forward to working with you!

Doug Koenig

Using Clio Practice Management Tools to Service Clients, Reduce Risk, and Maintain Competence

Table Of Contents

Practice Management, Clio, and the Top 12 Clio Integrations	1
Author	4
How to use this book	5
A Law Firm is a Small Business	5
The Competent Law Firm	6
People	7
Technology	8
Systems	8
Example of Systems	9
How does Practice Management help?	10
Attributes of a Practice Management system	10
Embedded CRM Functions	10
Supporting Client Relationships	10
Managing Risk	11
Maintaining financial competence	12
Improving Productivity	13

Maximizing Profitability 13
Advanced features in Clio 14
Top 12 Clio Integrations 16
Lexicata 16
Agile Law Depositions 16
Docketalarm 17
Fastcase 17
Webmerge 17
Zapier 18
Google Gmail connection 18
Casemail 18
Wealth Counsel 19
Quickbooks Accounting on-line 19
Ruby Receptionists 19
Tali 20
For more information 20

Table Of Contents

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- Retired from Ford Motor Company, Dearborn, MI
- Elder Law Attorney, Durham, NC and DRC Certified Mediator
- Several Awards, including 2016 finalist for Entrepreneurial Atty of the year
- Author of books on Elder issues and Law Firm Automation
- Infusionsoft Certified Partner, Clio Certified Pro

How to use this book

A Law firm is a business. As such, it uses systems to run all the procedures and processes, inside and outside. You must understand and master your systems in order to effectively automate anything. I wrote the first part of the book to educate you about a law firms systems in general. Yours are unique, of course, but these are general thoughts.

Now, if you are looking for the Top 12 Integrations with Clio, skip down to the end.

But, if you want to know more about why the integrations can help your firm, and why you should not just start adding in integrations, read onward. Eventually you WILL get to the integrations … I promise!

A Law Firm is a Small Business

As a solo entrepreneur - All jobs fall to the owner

As the firm grows – Some jobs can be delegated, but never the responsibility for performance.

What is involved in running the business?

- **Sales and Marketing** – from lead generation to closed business
- **Delivery** – of legal services and products and development of procedures
- **HR** – hire, fire, management, delegation, leadership
- **Management** – meeting dates, planning products or services, empowering staff
- **Financials** – Billing & collection, Trust funds, income and expenses, investments
- **Fixtures** – building, office space, telephone, computers, integrations, outside help
- **Hiring the staff and attorneys and training them**
- **Implementing relevant technology and learning how to use it**
- **Putting the right procedures in place (systems) and monitoring compliance**
- **Creating a continuous learning environment**

The Competent Law Firm

The goal of the competent law firm is to be a sustainable business which means you are first and foremost profitable, and then become a great place to work for you and your staff. All the while you have to produce high quality legal services.

It is not an easy job!

You have to manage the business, deliver the services, and manage the entire scope of relationships and risk! This may include:

- People
- Technology
- Systems
- Continuous learning
- Legal Services Delivery
- Client relationships
- Risk Management
- Quality Products

People

People want to do good work – They just don't know how. Your job is to show them what they need to do and incentivize them to do it. It isn't always just a money-thing.

Procedures are foundational to training your staff. Well-trained people like their jobs because they can feel successful and that they can contribute to the success of the firm.

Audits and monitoring essential to compliance because as much as your people will like what they do, we all stray from the processes. You have to observe and correct behaviors. This isn't vindictive or "Big Brother" style management, but gracious correction toward the overall firm success story.

Give them a reason to love working with you and you will have the most loyal employees ever!

Technology

Basic Technology can support competence

- eDiscovery
- Communication and confidentiality
- Advanced technology can leverage your systems through automation

Technology and systems give you the means to monitor your firm

- Improves Profits and Productivity of your team

Reduce turnover - The “American Lawyer” recently found that law firms with the **most use of technology** and the **best training** on the use of that technology had the **lowest turnover** rate of young attorneys for all firms surveyed.

So, learning about technology isn't just for you, but for your young lawyers and your staff.

Systems

Systems are "repeatable procedures". Some systems relate to technology. Eventually, Some become automated, some based on automation.

Systems make a difference in your firm because they enable you to:

- Reduce errors in your practice
- Reduce risk to your firm and your clients
- Improve competence in delivery
- Improve productivity and Improve efficiency, and
- Increase profits

Systems allow your people to work efficiently and competently

Systems provide data for continuous learning

Example of Systems

A typical firm might have dozens of documented systems. Here are some examples.

- Phone call scripts (inbound and outbound)
- Initial meeting procedures
- Compliance with Calendars and Court dates
- Proper Conflict checks and screening
- Client Intake and Secure Communication
- Pricing and quotations, billing, and collections
- ... and many more
- Practice Management is an "Integrated System"

How does Practice Management help?

Attributes of a Practice Management system

A good practice management system

- Protects your data
- Cloud-based
- CRM (Customer Relationship Manager)
- Supports your workflow
- Assigns tasks to staff
- Integrates Calendars and Court dates
- Provides Billings and Accounting
- Assists with Document merges

In addition, the systems protect your firm.

- Protects your clients and your firm from errors
- Secure Communication between staff and client
- Support conflict checking prior to engagement
- Integrates with secure external repositories, e.g., DropBox and Drive

Embedded CRM Functions

Supporting Client Relationships

- Clio is a client data repository
  Provides history and notes

- Available for each client:
  - Matters and Related Activity and matters
  - Transactions and Invoices
  - Secure Communications
  - Shared Documents
- Manage Communications
  - eMails
  - Documents
  - Assign and Track Tasks
  - Set up mail campaigns and follow-up
- Client Portals
  - Assign tasks to clients
  - Assign calendar entries
  - Send invoices directly to clients
- Email integration
  Gmail or Outlook file directly to Clio Documents

Managing Risk

Clio is a risk management database

- Provides matter history and notes
- Available for each matter
    - Matters and Related Activity and matters
    - Transactions and Invoices
    - Secure Communications
    - Shared Documents
    - Calendars (multiple for staff and attorneys)

Risk Management

- Conflicts Checking
    - Across contacts and matters
    - Includes documents and notes
- Calendars
    - Assigned Tasks
    - All Staff
    - Court Dates and SOL
    - Custom Calendars
- Detailed Matter History
    - For all users
    - All history
    - All matters

Maintaining financial competence

- Trust Accounting and monthly reconciliation
- Matter budgets
- Track activity
- Alert when near threshold
- Protects profitability

Improving Productivity

- Document Merges

  Create documents directly from Clio matter and client information

- Text Snippets

  Reduces typing of common phrases (e.g. EMTC = Email to Client)

- Custom Fields
  - Links to Clio data
  - Allows fine-tuning of Clio
- Mobile apps

Maximizing Profitability

- Credit Card Processing
  - Law Pay direct to trust account
  - Payments feed through to Accounting
  - Over 80% of firms have collection issues
  - Only 83% of bills are collected
- Third party accounting integration
  Xero or QB (plus others)

- Tracking Marketing Campaign performance

Advanced features in Clio

- Third-party integration (via API, Zapier, and direct connections)
  - Ruby Reception (intake forms feed client information directly to Clio)
  - Wealth Counsel (intake forms feed document generation)
- Credit Card processing and Electronic Payments
- Simplified Billing and export to QB or Xero
- Sync with external systems (e.g., Gmail, Outlook, etc.)
- Reporting for matters, clients, accounting, attorneys
- Export of data for clients, matters and more
- Client portal (Bills, Communication, Documents)
- Custom Fields to fine-tune your data
- Matter Budgets

Top 12 Clio Integrations

Lexicata

Lexicata is a law firm CRM that expands the intake processing capability of Clio. They focus on three components in the typical Sales Cycles for law forms, including:

- Tracking Leads prior to initial consult,
- Collecting client information (intake processes), and
- Signing the engagement letter as part of hiring your law firm.

All matters and contact information can be collected in Lexicata and exported easily to Clio. Plus, your clients do most of the intake!

Only client details are in Clio, allowing your firm to keep Clio cleanly for "Clients" and let Lexicata handle all the work with leads and prospects prior to hire.

Lexicata will integrate with Zapier in the near term.

Agile Law Depositions

Agile Law helps lawyers effectively create and manage depositions. The deposition tool facilitates faster, more effective depositions without having to be at your desk. Easily add your documents from Clio to your depositions in Agile Law with Clio's Agile Law's Deposition Tool integration.

Docketalarm

Docketalarm is like an alert for legal information. Docketalarm allows you to set up keyword searches for data in Federal, Bankruptcy and Appellate Courts, the Supreme Court, International Trade Commission, and more.

Never manually check the court docket again. Receive alerts on new court activity with filings attached. Also, get alerts when new lawsuits are filed against a company, or matching your search criteria. Bulk download hundreds of filings at once, and export anything to a spreadsheet.
All of your filings in Docketalarm will be automatically synchronized to your Clio Documents, linked to the appropriate Matter.

Fastcase

Import Fastcase search results into Clio and save them directly to the relevant matter. Clio and Fastcase are linked up so that you can start a timer for your research session in Fastcase and have the activity recorded in Clio.

Fastcase is supported by your NCBA membership, and most state bar associations include Fastcase as a benefit.

Webmerge

Clio's Webmerge integration makes it much easier to create documents such as contracts or forms. Save documents back to Matters in Clio while simultaneously delivering them via email, e-signature, postal mail, and more.

Zapier

For Clio users working through automation, Zapier is the gold standard for integrating two or more apps to work in a single action. Now, new Multi-Step Zaps functionality expands that function even more.

What can you do? Well, imagine being able to have a prospect fill in a Lead form, have them automatically added to your Infusionsoft newsletter mailing list, and create a new project in Lexicata, all happening in the background while you take care of billable matters.

Google Gmail connection

Clio fully integrates with Google Apps, and combines with Gmail through Clio's Gmail extension. After you securely connect your Gmail or Google Apps account to your Clio account, you can start a Timer, create Tasks, or file emails with attachments to the right Clio Matter within seconds.

Yes, there is an Outlook connection as well, and it is very robust.

Casemail

Casemail gives Clio users the ability to mail digital documents via First Class, Certified Mail, FedEx, and UPS mail, directly from Clio. Mailing and time expenses saved within Clio.

Proof of Mailing and Receipt of Delivery are automatically stored online. Casemail is an authorized notice provider by all U.S. Courts to serve bankruptcy notices.

Wealth Counsel

WealthCounsel is a membership-based organization that provides estate and business planning attorneys with cloud-based legal document drafting software, educational services and resources to build your practice. Move seamlessly from Clio to drafting documents for your clients - without the hassle of rekeying all the matters and client information you just entered in Clio.

Quickbooks Accounting on-line

Manage all of your billing and trust workflows in Clio and Quickbooks Online. When you update contacts, edit invoices, receive payments, or create credit notes in Clio, Clio will automatically update the information in QuickBooks Online.

Ruby Receptionists

Ruby receptionists answer your calls. Their detailed messages are synced with Clio.

Ruby automatically syncs all your calls, voicemails and messages with Clio so you can easily assign them to the appropriate matters. Their intelligent call data, including the date and length of call are available in your Clio communication log, so you can bill easily and accurately.

There are many such systems, and some integrate with Infusionsoft and Zapier, so, do the research and look for key details (e.g., weekend coverage).

Tali

Tali is a voice-driven, hands-free productivity assistant powered by artificial intelligence. With Tali, users can eliminate the administrative burden of time entry by seamlessly tracking time throughout the day, using nothing more than their voice.

Tali works with any Amazon Alexa-enabled device, including mobile phones, making her a time-tracking assistant that goes wherever you go.

Tali learns as you use it, so start tracking time today!

For more information

Call us today at 984-234-5880

For more information, including eBooks for “Top 10 Clio Features” and “Key Clio Setup Steps” and a link to a free trial via my affiliation with Clio, go to here:

Free Clio related Resources and Free Clio Trial