

CLIO GROW BUYER'S GUIDE

# The leading client intake and legal CRM software for law firms

Make your client intake process more organized, efficient, and profitable



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



I feel like we are able to thrive as lawyers because we have tools like Clio that allow us to meet client needs in a way that is unprecedented in our industry.

**LORI BEIGHT**

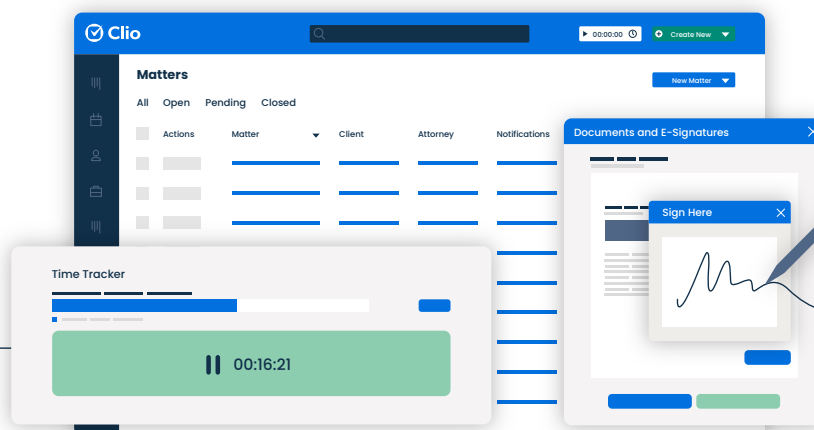
Cascade Legal Planning LLC

# Introducing Clio

**Clio** empowers lawyers to be both client-centered and firm-focused through a suite of cloud-based solutions, including legal practice management software and client intake and legal CRM software. Clio has been transforming the industry for over a decade with 150,000 customers spanning 100 countries, and the approval of over 70 bar associations and law societies globally. The company continues to lead the industry with initiatives like the *Legal Trends Report*, the Clio Cloud Conference, and the Clio Academic Access Program.

Clio is used by law firms of all sizes—from solo and small firms to mid-size and large firms—across an array of practice areas. In this guide, you will learn how these firms use Clio to save time, increase profitability, and better serve clients.

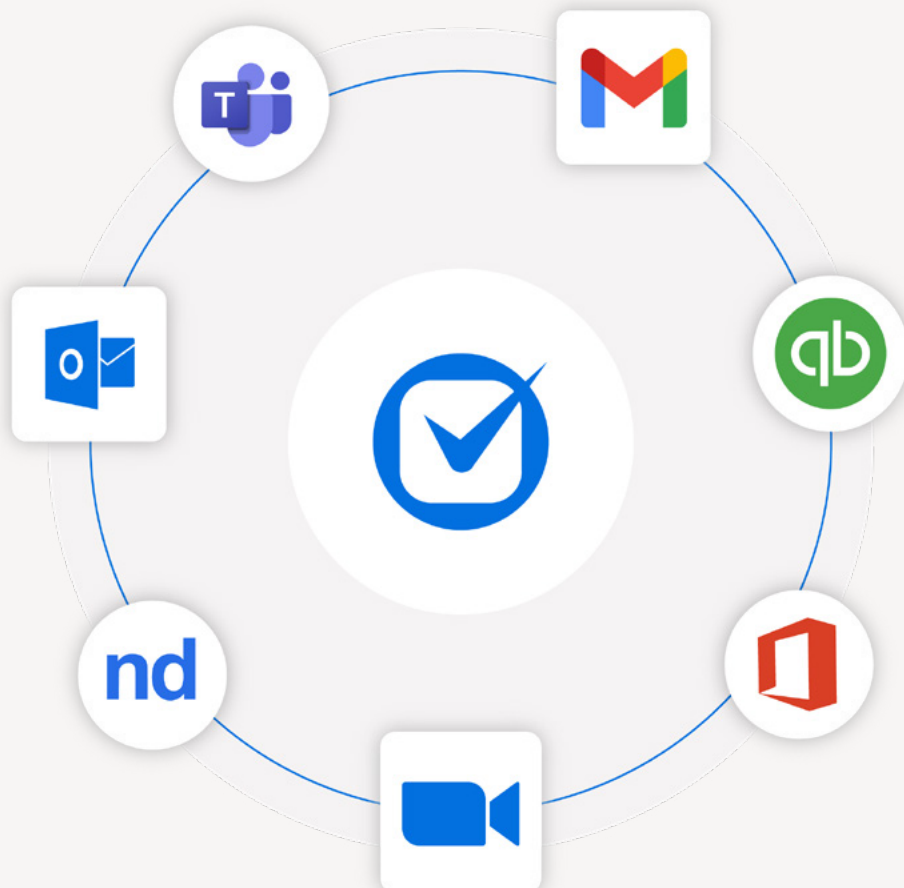
If you have any questions or would like to schedule a demo of Clio, call 1-888-858-2546 or email [sales@clio.com](mailto:sales@clio.com).



# Run your law firm on the leading cloud- based legal platform so you can:

## BETTER SERVE YOUR CLIENTS WHILE ENHANCING FIRM EFFICIENCY

Clio helps law firms provide better client experiences through a range of client-facing benefits, including video conferencing integrations, paperless document workflows, online billing and payments, and many other time-saving features. Easy to set up and use, Clio operates seamlessly as the foundation of your practice.



### CONNECT CLIO WITH OTHER ESSENTIAL SOFTWARE

Clio acts as the central hub which connects other essential software your firm uses on a regular basis. The Clio platform boasts the legal industry's largest directory of software integrations, such as Google business solutions, Microsoft 365, Dropbox, QuickBooks Online, Zoom, DocuSign, and over [200 additional applications](#).

### GET INDUSTRY-LEADING SECURITY AND 24/5 SUPPORT

Clio's [industry-leading security](#) features ensure that your firm's data is protected at all times—and that it's accessible only to firm members and stakeholders under strict permissions. Clio offers [24-hour support](#) services 5 days per week, and provides in-depth training resources based on the success of tens of thousands of law firms worldwide.

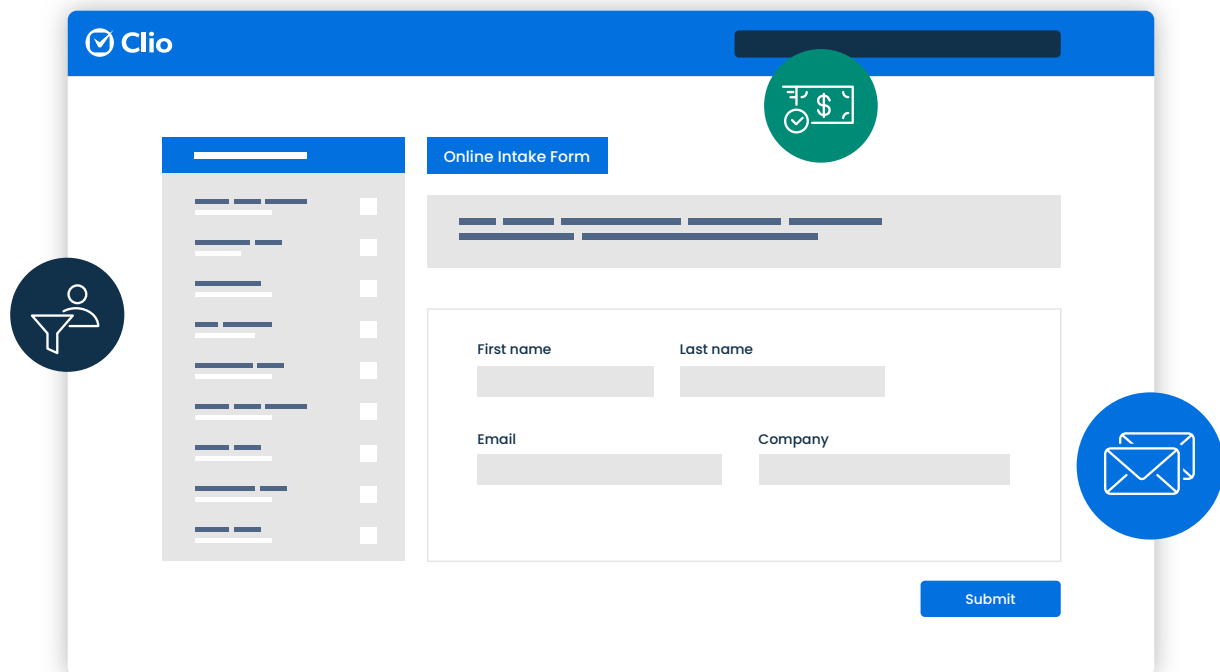
### WORK FROM ANYWHERE

Clio provides cloud-based solutions that allow you to work remotely with clients, ensuring that all your firm's information is available—and secure—from anywhere, at any time, across all of your devices.



# Clio Grow

## Client Intake and Client Relationship Management (CRM)



The screenshot displays the Clio Grow Online Intake Form. The interface features a blue header with the Clio logo and a search bar. A sidebar on the left contains a list of client records, each with a checkbox. The main content area is titled 'Online Intake Form' and includes a large text input field at the top. Below this, there are four labeled input fields: 'First name', 'Last name', 'Email', and 'Company'. A blue 'Submit' button is located at the bottom right of the form. Four circular icons are overlaid on the interface: a green circle with a clock and dollar sign icon near the top right, a dark blue circle with a person icon on the left sidebar, a blue circle with an envelope icon on the right, and a blue circle with a document icon near the bottom right.

### RETAIN MORE NEW CLIENTS AND ENHANCE COMMUNICATION

Beyond comprehensive case management and billing solutions, Clio gives you the ability to earn more business and streamline all of your firm's outbound communications. With [Clio Grow](#), Clio's client intake and client relationship management (CRM) software, you can attract potential new clients, keep prospects from falling through the cracks, accelerate your client intake process, and keep better tabs on all of your firm's relationships.



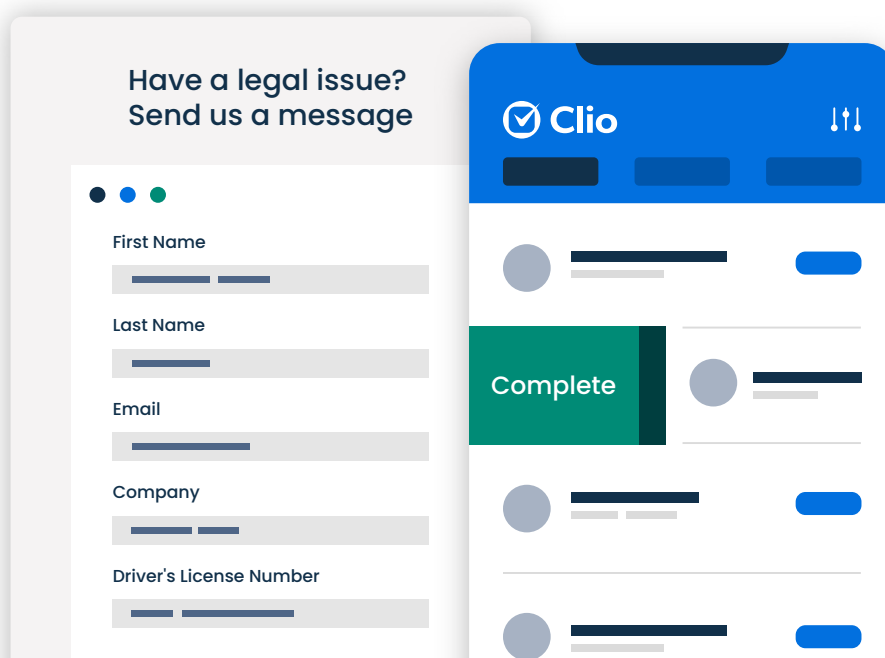
## BRING POTENTIAL NEW CLIENTS INTO YOUR FIRM QUICKLY AND EFFICIENTLY

Clio's [client intake system](#) helps you provide attentive service to potential clients reaching out for legal assistance. From the moment a new prospect first contacts your firm, Clio helps you seamlessly bring the prospect into your system via customizable online intake forms which rapidly gather the potential client's information. All of the form information automatically populates into the prospective client's electronic records—should they hire your firm, the client's information will be readily available across the entire Clio platform, so you never have to input data multiple times.

## SCHEDULE CONSULTATIONS AND COLLECT PAYMENTS ONLINE

With Clio's [appointment booking](#) features, potential clients can quickly schedule appointments in your calendar simply by clicking a link you share with them via email (or on your website). Clio also integrates with Google My Business, so if a potential client comes across your firm during an online search for legal services, the client can book an appointment with you directly from their search results.

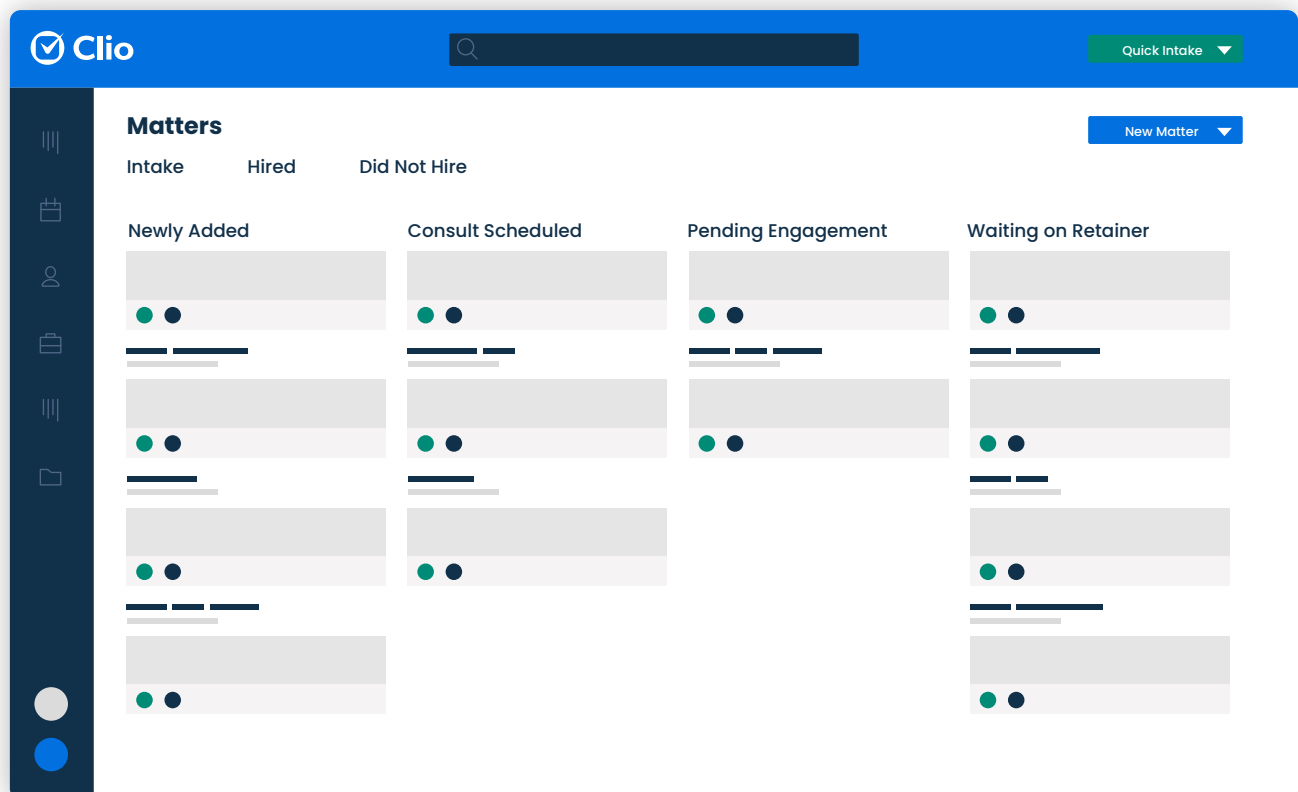
You can add automated payment features to online appointment bookings, thus enabling potential clients to pay in advance of their consultations. (These payments are then automatically deposited to your firm's operating account.) You can also automate the creation of retainer agreements and share them instantly for clients to sign via e-signature—without the need for mailing, faxing, or in-person meetups.



## GAIN A BETTER UNDERSTANDING OF YOUR CLIENT INTAKE PIPELINE

Clio gives you more [insights into prospective clients](#), which can be especially valuable when checking for conflicts of interest. You can search incoming prospects within your existing contact and matter database to quickly identify if a person has any association with current or past matters.

Clio also allows you to collect detailed information on how potential clients discover your firm. You can combine this data with the eventual earnings you receive from the client or matter, and this enables you to identify which business sources are most lucrative for your firm. This helps you learn which clients and matters generate the most revenue for you, so you can maximize new revenue opportunities and adjust your business strategies as needed.



# Pricing

## VERSATILE PLANS. POWERFUL FEATURES. SIMPLE PRICING.

Pick a plan that's right for your law firm. Streamline your firm operations with online time tracking, billing, payments, and more.

Save with annual pricing.

Starter	Boutique	Most Popular Elite	Bundle & Save 15% Suite	Enterprise
Bill efficiently by tracking time and sending invoices easily.	Grow your law firm by managing it effectively and getting paid faster.	Work smarter and scale reliably with full text search, court rules, and more.	Everything you need to run, manage, and grow your law firm.	Enterprise-grade solutions for mid-sized and large firms.
<b>\$39</b>	<b>\$59</b>	<b>\$99</b>	<b>\$125</b>	
per user/per month USD billed annually (\$49 per user/per month USD billed monthly)	per user/per month USD billed annually (\$69 per user/per month USD billed monthly)	per user/per month USD billed annually (\$109 per user/per month USD billed monthly)	per user/per month USD billed annually (\$145 per user/per month USD billed monthly)	Contact us for pricing.
<b>CLIO MANAGE: STARTER</b>	<b>CLIO MANAGE: BOUTIQUE</b>	<b>CLIO MANAGE: ELITE</b>	<b>CLIO MANAGE &amp; CLIO GROW</b>	<b>ENTERPRISE</b>
<ul style="list-style-type: none"><li>✓ Time Tracking</li><li>✓ Hourly and Flat-fee Billing</li><li>✓ Calendar</li><li>✓ Reporting</li></ul>	<p>Everything in Starter and...</p> <ul style="list-style-type: none"><li>✓ Custom Fields</li><li>✓ e-Signature</li><li>✓ Online Card Payments</li><li>✓ Firm Dashboard</li><li>✓ Over 200 integrations including QuickBooks Online, Google, Microsoft Office, Zoom</li><li>✓ <b>Optional Clío Grow Add On</b></li></ul>	<p>Everything in Boutique and...</p> <ul style="list-style-type: none"><li>✓ Matter Budgets</li><li>✓ Court Calendaring Rules</li><li>✓ Advanced Reporting</li><li>✓ Advanced Tasks</li><li>✓ Full Text Search</li><li>✓ Priority Support</li><li>✓ Live Training</li><li>✓ <b>Optional Clío Grow Add On</b></li></ul>	<p>Everything in Elite and...</p> <ul style="list-style-type: none"><li>✓ Intake Forms</li><li>✓ Email Automation</li><li>✓ Legal CRM</li><li>✓ Account Setup</li><li>✓ <b>Includes Clío Grow Add On</b></li></ul>	<p>Everything in Suite and...</p> <ul style="list-style-type: none"><li>✓ Priority Tech Support</li><li>✓ Dedicated CSM</li><li>✓ Advanced Data Services</li><li>✓ <b>Includes Clío Grow Add On</b></li></ul>

<p><b>ADD ON</b></p> <p><b>Clio Grow</b></p> <p>CLIENT INTAKE AND LEGAL CRM SOFTWARE</p> <p>Standardize the client intake process, build strong relationships, and get powerful data insights to grow your firm.</p>	<p><b>\$49</b></p> <p>per user/per month USD billed annually</p> <p>(\$59 per user/per month USD billed monthly)</p>
--	--

Get started for free, with training and unlimited support.  
No credit card required.



THE WORLDWIDE LEADER IN  
CLOUD-BASED LEGAL TECHNOLOGY

# Getting started with Clio is easy

Clio's cloud-based solutions are free to try, and the company offers a large roster of support, training, and practice management experts. The Clio team has helped tens of thousands of law firms get up and running—including migrating data from other software providers. To see how Clio can help you manage and grow your firm, schedule a free demo at [clio.com](https://clio.com), call 1-888-858-2546, or email [sales@clio.com](mailto:sales@clio.com).