

THE CASE FOR GROWTH

Client Portal Implementation Guide

Improve client experience with secure document sharing and updates

thecaseforgrowth.com

Why Client Portals Matter

- Reduce email clutter by 40%
- Clients can access case updates 24/7
- Secure document sharing
- Transparency builds trust
- Less time answering "what's happening?" questions

Essential Features

- Secure login with two-factor authentication
- Document upload/download
- Case timeline and status updates
- Secure messaging

- Invoice viewing and payment
- Mobile app access

Implementation Steps

1. Choose portal software (Clio, MyCase, etc.)
2. Customize with your branding
3. Create client onboarding materials
4. Train staff on portal features
5. Launch with new clients first
6. Migrate existing clients gradually
7. Monitor usage and gather feedback