Case study: Clio case management software (1000 words)

Legal technology is a type of technology that helps legal professionals deliver legal services in an efficient way.[[1]](#footnote-2) For the last 50 years,[[2]](#footnote-3) law firms have looked for innovative ways to improve productivity, workflow, and client service. Unlike traditional hardware like computers, printers and scanners,[[3]](#footnote-4) legal technology goes a step further by leveraging the use of software applications to streamline and facilitate essential legal processes.[[4]](#footnote-5) These software applications help to optimise daily tasks and operations at a law firm in areas like administration; appointments & scheduling, finances; accounting, billing, tracking of cash flows, case management, document organization, legal research, electronic Discovery (eDiscovery), client communication and collaboration, automation and workflows optimization.[[5]](#footnote-6)

When selecting the right legal tech tool, a firm may consider the following: costs, efficiency, peer reviews, tailored criteria, recommendations from IT departments, compatibility with existing tools or even whether legal technology company offers free trials/tests.[[6]](#footnote-7) In this case study, Avery Law will be the focal point for discussing the challenges they faced in their day-to-day operations. Clio case management is the legal technology product Avery Law deemed fit to address challenges. This case study looks to explore how these challenges affected productivity within the firm and how the implementation of Clio case management improved operations and streamlined workflow processes.

Avery Law, a firm which embraces the use of technology to provide niche legal services with focus on corporate, finance and commercial matters in the growth tech sector.[[7]](#footnote-8) The small English law firm was established in 2012, with expertise in transactional matters and have since supported clients including entrepreneurs, private clients, SME’s and start-ups.[[8]](#footnote-9) It’s important to note although the firm did not start as a traditional law firm, it was not able to operate virtually.[[9]](#footnote-10) The firm faced several challenges within operations which led to excessive workload, stressed working environment, suboptimal financial performance, poor client engagement and dauting client experience.[[10]](#footnote-11)

The fundamental reason for the difficulties Avery Law encountered was a result of their manual approach to handling day-to-day operational tasks. This approach required extensive time involvement and affected productivity in several areas. Administrative and billing practices were described as “outdated”, “laborious” and “clunky” failing to meet their standards for a cloud-based firm.[[11]](#footnote-12) This was evident through the manual production of invoices, the extensive time taken to prepare client engagement letters and inability to evenly distribute responsibilities amongst the team. This difficulty caused the firm to witness other issues such as financial stagnation, delayed staff pay, underperformance within client engagement and work stress.[[12]](#footnote-13)

Clio case management was installed in August 2015 and since then, there the firm’s productivity has soared, specifically within the day-to-day operational tasks.[[13]](#footnote-14) The cloud-based practice management software now enables the firm to manage operations (Administration, human resources, and billing) virtually without physical limitations.[[14]](#footnote-15) For example, data is not only restricted to a computer and allows staff to save their assignments and work remotely and it can be used to schedule appointments, track client records.[[15]](#footnote-16) Also, Clio has written integration with NetDocuments, which allows lawyers to access documents as well as an integration with Xero for accounting, facilitating a centralised approach.[[16]](#footnote-17) This feature within operations enhances workflow consolidating tasks into a single accessible location.[[17]](#footnote-18)

The firm operations also benefit from significant time savings. This is demonstrated by the swift preparation of engagement now completed in 10 to 15 minutes, whereas it previously took 30 minutes to 1 hour.[[18]](#footnote-19) Moreover, prior to the implementation of Clio, managing billing, administration and human resources were the sole responsibilities of the two partners.[[19]](#footnote-20) Now, the rest of the team are involved in managing these tasks. Whilst this highlights time-efficiency, with more staff taking more responsibilities the team now have a better understanding and overview of the firm. This demonstrates how the technology has elevated collaboration, communication, and synergy amongst one another.

Pre-Clio case management incorporation, an additional concern for the firm was the difficulty in efficiently interacting with clients.[[20]](#footnote-21) Now, it digitally creates engagement and communication templates and has reduced 50% of the time taken to get client onboarded.[[21]](#footnote-22) Lawyers can now practice being lawyers rather than squander time by manually producing documents.[[22]](#footnote-23) Additionally, Mr Turney one of the managing partners, has testified to the improvement of building better client relationships due to flexible work arrangements.[[23]](#footnote-24)

Clio has not only been asset to establishing good rapport between clients but also amongst the firm’s team. Prior to the adoption of Clio case management, staff members were unable to have work life balance.[[24]](#footnote-25) They often found themselves working into the night to keep up with their workload, indicating high levels of stress, fatigue, and potential burnout.[[25]](#footnote-26) Now, there is a healthier work environment, lawyers are able operate virtually, working from home or anywhere in the world and practice law in a way that best serves their client.[[26]](#footnote-27) Furthermore, due to benefits across all aspects, Avery Law has achieved substantial rise in its finances marking an end to financial stagnation.[[27]](#footnote-28)

Although Avery Law has good testimonies of Clio case management software, it is unclear whether Avery Law tested other legal tech products and moreover shared limited information on the selection process. As mentioned at the beginning of this case stud, law firms may formulate a criterion based on costs, efficiency, peer reviews, tailored criteria, recommendations from IT departments, compatibility with existing tools or free trials. However, Avery Law does not reveal their entire criteria but highlights that they were looking for a software that would enhance day to day tasks, essentially being highly efficient. Another determining factor was the software’s intuitiveness and compatibility for the needs of the English firm.

Although Avery Law does not comment on cost efficiency, many firms have testified that in comparison to other legal software, Clio appears to offer the most cost effective and flexible case management software. It costs a user £45/month when billed annually, or £59 per user/month when billed monthly.[[28]](#footnote-29) Unlike other legal software, Clio has no hidden fees or contractual agreements meaning you can decide to leave at any time with no penalties or cancellation fees.[[29]](#footnote-30)

Moving forward Avery Law may benefit from continues evaluation and optimisation of Clio case management software to ensure the evolving needs of the firm is met. Recommendations for improvement may include exploring additional features which will further enhance efficiency, providing ongoing training, conducting periodic reviews to assess the effectiveness of the software. While this case highlights the positive impact of legal technology on Avery Law’s operations, there is always room for refinement driving efficiency and productivity in the firm’s day-to-day activities.

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