

# Philip Wong

Product Designer



Clio is a leading legal practice management software  
for legal professionals worldwide.

## MISSION

To transform the legal experience for all.

# My role

I am a Product Designer on the **Clio Payments** team solving  
billing and collections problems.

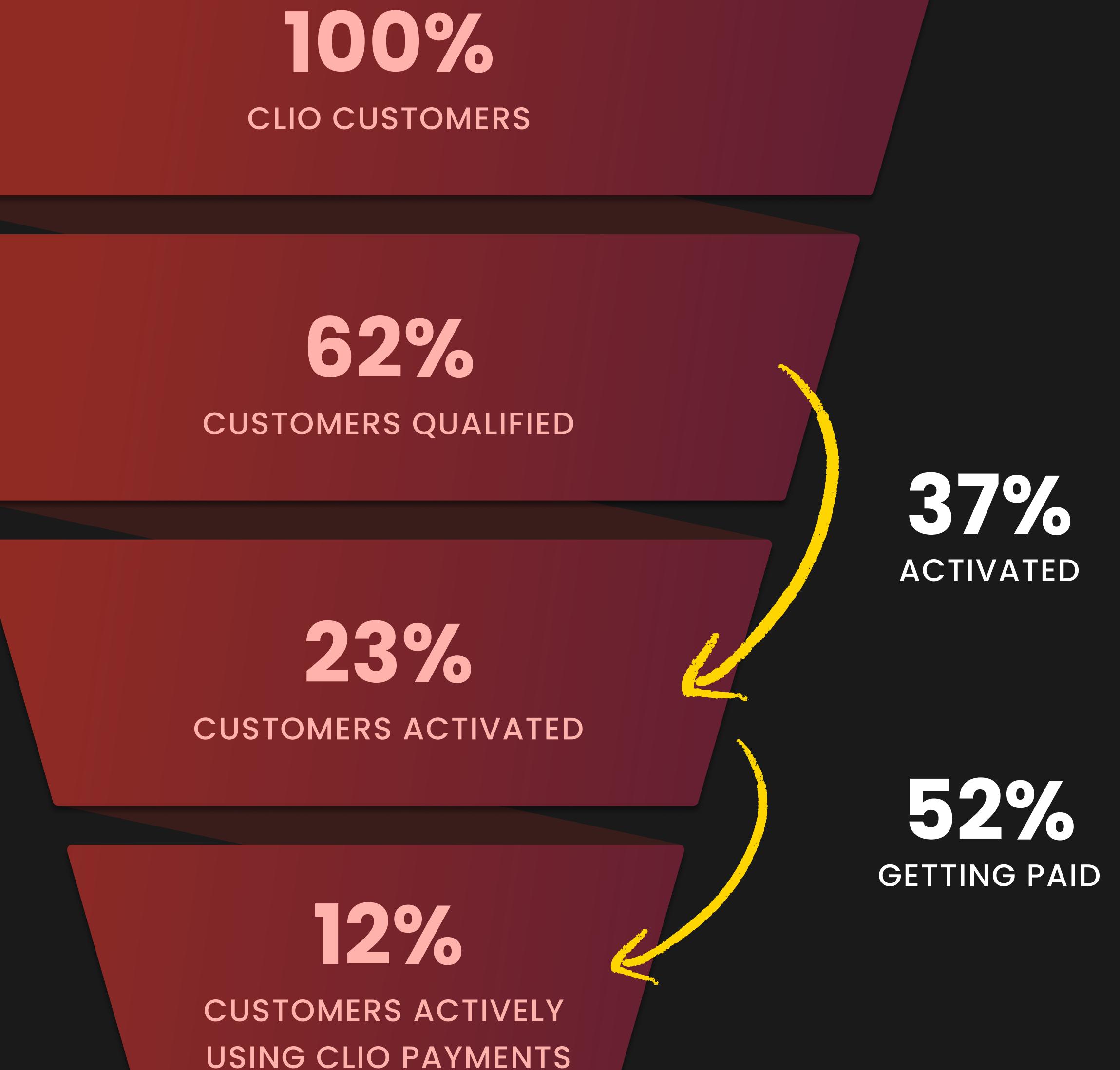
# What is Clio Payments?

Clio Payments is a built-in feature that enables legal professionals to accept payments online for their legal services in a fast and secure way.

## Customers using Clio Payments in 2018

### The problem

There is a low percentage of customers using Clio Payments to accept payments online.



# Opportunity

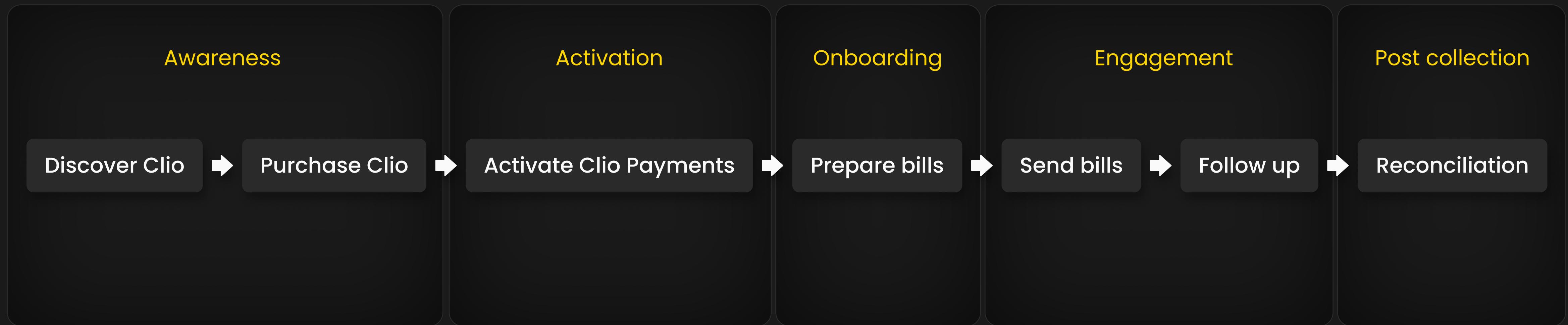
With Clio Payments, Clio takes a cut from payments made. This helps our customers to collect faster. From Clio's standpoint, it helps Clio establishes a new revenue stream.

By eliminating the hassle to collect, our customers can focus on helping clients get access to justices and transform the legal experience for all.

# Customer journey

Discover Clio ➔ Purchase Clio ➔ Activate Clio Payments ➔ Prepare bills ➔ Send bills ➔ Follow up ➔ Reconciliation

# Customer journey



We identified there are 5 stages to go through in order for customers to go from being an eligible customer to actively receiving payments. In each stage, there are pain points our customers were facing.

Here are some samples on how we tackle  
these pain points for each stage.

# Awareness

Let our customers know how accepting payment online can help them in throughout their customer journey.

**Clio Payments**  
Powered by LawPay

**Get paid 39% faster!**  
Accept credit cards online with Clio Payments  
Credit card processing fees apply

[Activate for free](#)

Have an existing LawPay account?

[Sign in with LawPay](#)

With Clio Payments you'll enjoy the following benefits for FREE:

[Learn more](#)

- Increase cash flow
- Automate collections to save time
- Let clients pay on their terms
- Get LawPay for free
- Guarantee trust compliance
- Collect more with payment plans

**You've purchased the Elite plan.**

You can cancel your subscription at any time by visiting the [account information](#) page.  
[Terms and Conditions](#) | [Privacy Policy](#)

**I 39% faster!**  
eligible to collect credit card online with Clio Payments, by LawPay, for FREE\*  
out Clio Payments

**New to Clio Payments?**  
Activate Clio Payments **with a new LawPay account** between now until December 31st to receive \$100 in credit. [Learn more](#)

[Activate for free](#)

Existing LawPay account?

[Sign in with LawPay](#)

[Not yet, get started with Clio](#)

**Clio Payments**  
Powered by LawPay



**GET PAID FASTER WITH CLIO PAYMENTS**  
**Redeem your Amazon.com Gift Card\***

Schedule a personalized 30- minute training session on how to accept credit card payments in Clio, and redeem a \$250USD Amazon.com gift card.

[Schedule training](#)

\*One gift per account only, issued within 60 days of training.

# Activation

Reduce friction for customers to activate Clio Payments.

**Clio Payments application**

**i** Clio Payments is powered by LawPay. This application is a credit check for LawPay to verify your firm and owner's identity.

**Before you proceed**

The applicant should be an owner, officer or partner of the firm, entitled to accept LawPay's [Terms and Conditions](#) at the end of this application.

Have these items ready to submit:

**FIRM & OWNER'S INFORMATION**

- Federal Tax ID
- Social Security Number
- Driver License

[Why are these required?](#)

This Application may take up to 24 hours to process.

**Already a LawPay user? Activate now!**

**Clio Payments fees**

**\$20.00**  
Monthly LawPay fee  
Waived by Clio!

[Cancel application](#)

**About the owner (Step 2 of 4)**

The applicant should be an owner, officer or partner of the firm, entitled to accept LawPay's [Terms and Conditions](#) at the end of this application.

**Title**

Owner

**First name** Patrick

**Last name** Smith

**Social security number** – No hyphens. 394948839

**Date of birth** 09/08/1980

[Why is this required?](#)

**Home address**

394 Main Street Unit 104

**City** New York

**State** New York

**Zip code** 95031

**Years in residence**  
Insert 1 if the owner has lived at this address for less than a year.  
4

**Email** – Approval will be sent to this email. patrick.smith@clio.com

**Phone number** 9589389381

**Additional identification about the owner**

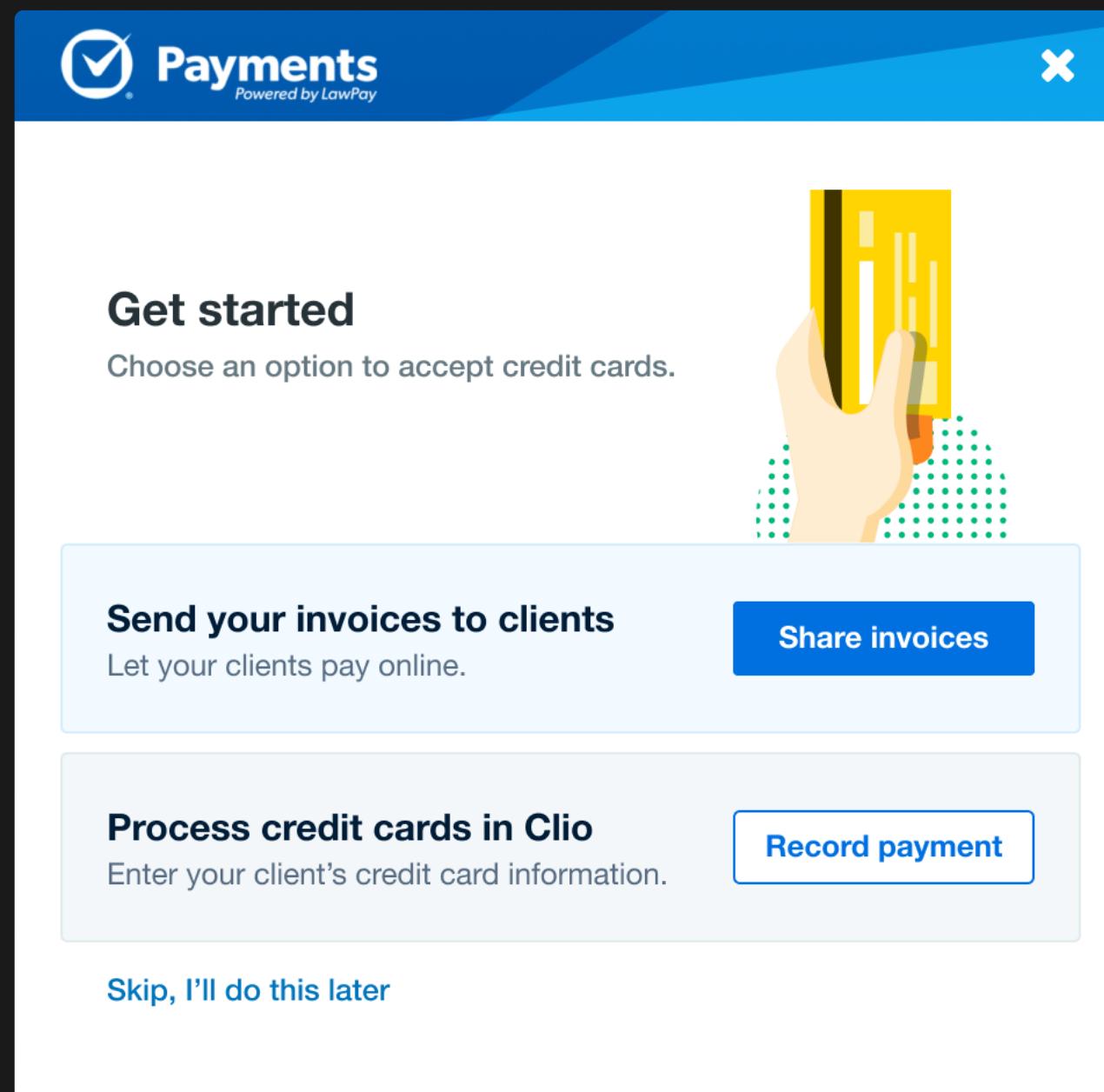
**Driver's license number** DL93821

**State** Arkansas

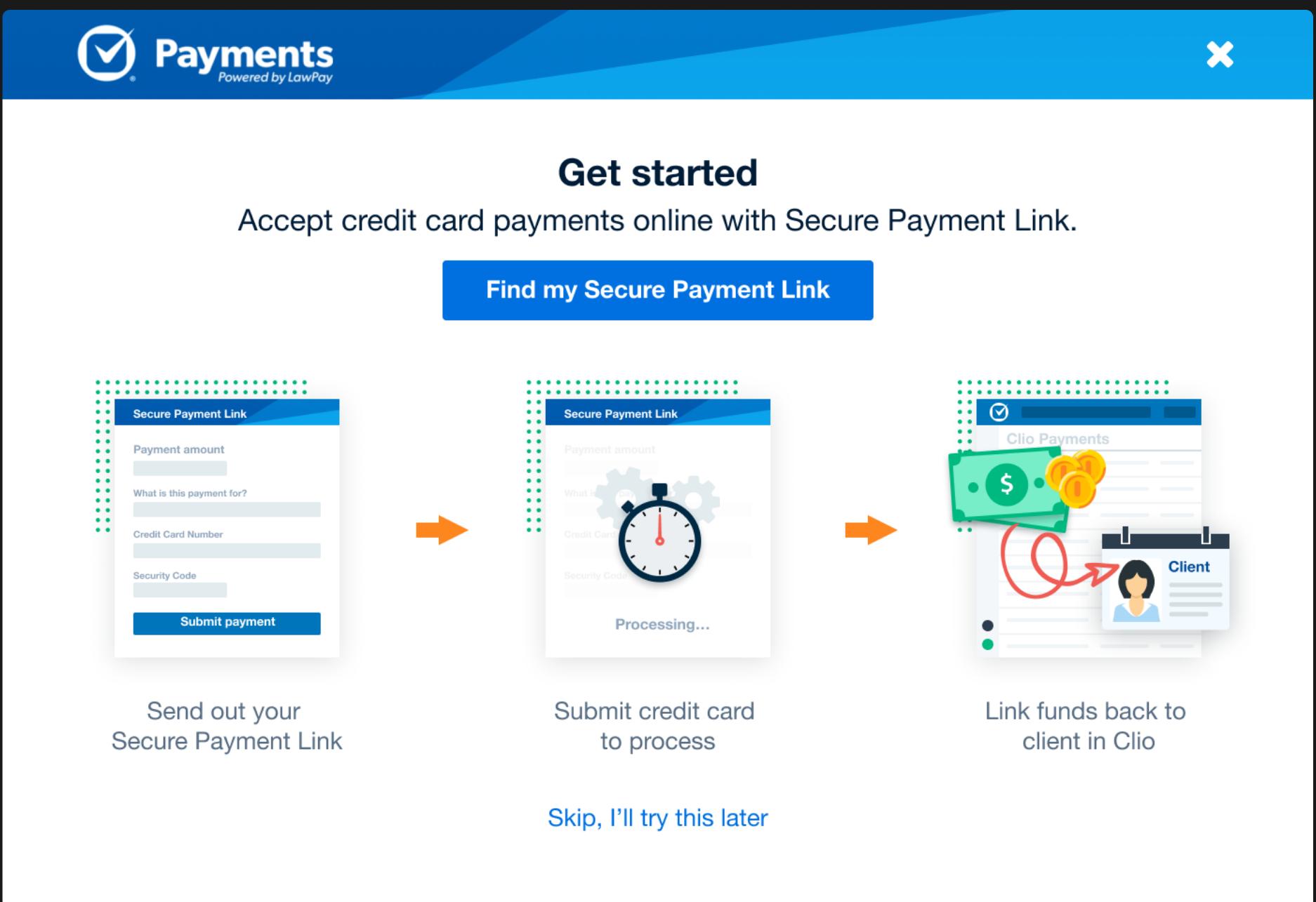
[Why is this required?](#)

# Onboarding

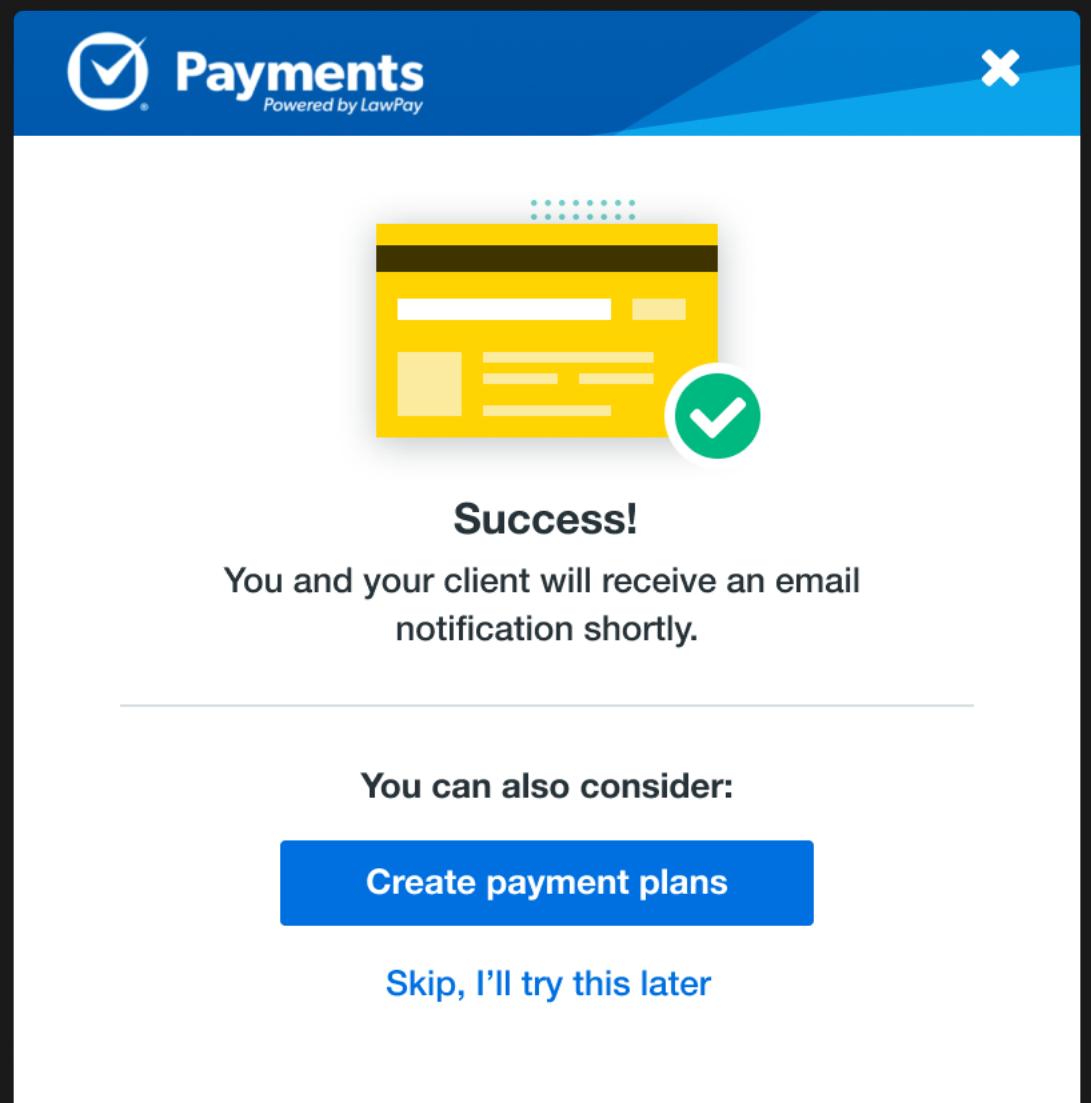
Guide our customers to use Clio Payments with clear instructions.



Self serve onboarding to create a bill.



Self serve onboarding to collect payments.



Show Clio Payments after their first bill is sent.

# Engagement

Make it easy for clients to pay.

A reminder from Smith LLC Attorneys at Law

Smith LLC Attorneys at Law <notifications@clio.com>

to me ▾



Smith LLC Attorneys at Law

Dear Wintheiser Group,

This is a friendly reminder that you have an outstanding balance.

Thank you for your business.

#### Outstanding bills

**Bill 2831** ([Download](#))

\$2,069.59

**Bill 2837** ([Download](#))

\$405.10

#### Total amount due

**\$2,474.69**

[Pay online now](#)



#### Payment to Smith LLC Attorneys at Law

All fields required

##### Total open balance

**\$2,474.69**

##### Payment amount

\$ 2474.69

Balance after payment: \$0.00

Payment will apply to bills in the order of due date from oldest to newest.

##### Bill details

Issued date	ID	Amount
2019/06/30	#2831	\$2,069.59
2019/08/30	#2837	\$405.10

##### Payment method

Credit Card  eCheck

##### Name on card

(Name)

##### Card number

(Card number)

##### Expiry month

MM

##### Expiry year

YYYY

##### Security code

(Security code)

##### Billing information

Email – To receive payment notification.

(Email address)

##### Street address

(Street address)

##### City

(City)

##### State/Province

Select a State/Province

##### Zip/Postal Code

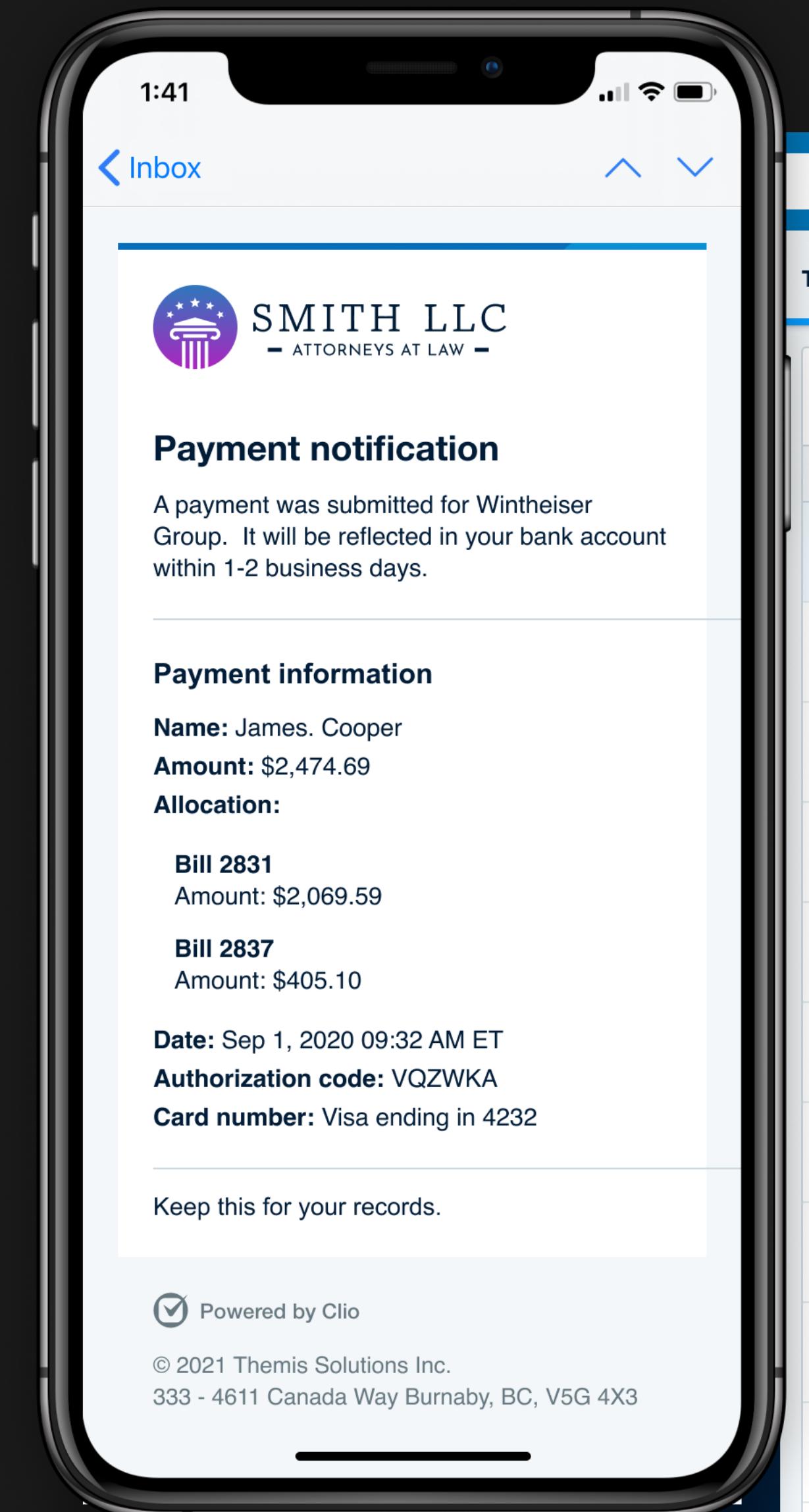
(Zip/Postal Code)

##### Country

United States

# Post collection

Stay on top of your collection with instant notification to let you know when payments are received.



Transactions				
Actions		Status	Client	Description
Edit		Completed	ABC Store	Consultation fee for James Cooper TD Trust
Refund	Completed	David Johnson	Payment plan instalment for Bill: 948 TD Bank	David Johnson Mastercard ending in 2834
Refund	Completed	Gary Goldman	Clio Scheduler payment for 30 mintue paid... TD Bank	Gary Ray Goldman VISA ending in 4232
	Completed	Link	Matter #91842 TD Bank	Alice Hendrix VISA ending in 4232
Refund	Completed	ABC Store	Payment for Bill: 953 TD Bank	ABC Limited Mastercard ending in 4232
Refund	Completed	David Johnson	Payment plan installment TD Trust	David & Co Mastercard ending in 4232
Edit	Completed	Gary Goldman	Bill #493 TD Bank	Gary Ray Goldman VISA ending in 1232
	Failed	Alice Hendrix	Payment for Trust Request: 3940 TD Trust	Alice Hendrix VISA ending in 4632
	Voided	David Johnson	Payment for Bill: 467 TD Bank	David & Co VISA ending in 1232

## Customers using Clio Payments in 2021

# Progress

Over the course of 3 years we see gradual improvements with more customers activating Clio Payments and more customers actively using it to accept payments online.

**100%**

CLIO CUSTOMERS

**89%**

CUSTOMERS QUALIFIED

**53%**

CUSTOMERS ACTIVATED

**33%**

CUSTOMERS ACTIVELY  
GETTING PAID

**57%**  
ACTIVATED

**62%**  
GETTING PAID



# Progress

2018

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37% activation rate

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2021

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 57% activation rate

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52% usage rate

 62% usage rate

# Thank you

Happy to chat further on my process.

[pwon67@gmail.com](mailto:pwon67@gmail.com)