Review: Clio (Practice Management in the Cloud)

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Clio
www.goclio.com

TechnoScore: 4.0
1 = Lowest Possible Score;
5 = Highest Possible Score

Software as a Service (SaaS) — we prefer the term Web app — has made significant inroads in areas such as project management and sales management. Themis Solutions has turned its attention to the legal profession. Its product, Clio, aims to make implementing a practice management system as simple as subscribing to a magazine. In this article, technology consultant and practice management expert Seth Rowland, Esq. reviews and rates Clio. Seth isn't the only person who has reviewed Clio, but his evaluation is the most thorough.

INTRODUCTION

One afternoon, after explaining to a law firm partner that I could not help him until he purchased a new file server, router, and network infrastructure (an expensive proposition), I sighed.

Why should software solutions be held hostage to inadequate hardware and infrastructure? Why does every managing attorney need to become a computer hardware specialist? Why does every office have to patch and secure their computer network from incessant Web-based attacks? Why is it so complicated? There must be a simpler way. And so I began my explorations of "The Cloud."

DEFINING THE CLOUD

The Internet "Cloud" and something called Software As A Service ("SaaS") promise to solve the infrastructure support and maintenance nightmare. Rather than purchasing hardware and installing software, you can purchase a service wherein someone else hosts the software on their own servers and charges you a monthly fee based on actual usage. Such "cloud hosting" is truly in the clouds because you, the consumer, never see the hardware or the software where your information is stored. All you see is the URL address in your browser and the data displayed when you log in.

Salesforce.com is probably the most famous and successful of the "Cloud" offerings. Siebel CRM also offers similar services. The appeal is that a dispersed sales force, with a wide range of computer types and operating systems, can connect to a single corporate database from anywhere in the world. Such services enable disparate teams to share vital client information and for management to oversee the activities of their sales force.

The beauty is that you can set up and configure such a system in under an hour, with no money up front; rather, you agree to pay a monthly fee for each registered user. Rather than assuming costs and risks of hardware and support, you receive service guarantees from the vendor for no additional charge.

And so I wondered that fateful afternoon: Wouldn't it be wonderful if such a tool existed for lawyers? In my search, I found Clio a Web-based practice management system designed expressly for lawyers. Having spent the past decade working with Client-Server based practice management systems as a consultant, I was excited to see what Clio has created.

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Before I take you through Clio, I want to disclose my prejudices. I am a LexisNexis CIC in Time Matters who has also supported a number of Amicus Attorney sites. I have also worked on custom systems in Lotus Notes, Lotus Organizer, Novel Groupwise, Lotus Agenda, and Microsoft Access, as well as dedicated CRM systems like Act!, Ecco, Outlook Exchange, and Siebel CRM. And so my expectations were shaped by what I knew to be available for lawyers in the Client/Server environment.

As a Lotus Notes programmer, I was accustomed to the ability to view the same record from multiple different views. And as a Time Matters consultant, I was accustomed to viewing data through the

window of automatic relations (every record has a Contact link and a Matter link) and specified relations (the ability to establish ad hoc links between any set of records).

FIRST LOOKS AT CLIO
My introduction to Clio came in the form of a one-hour walkthrough of the product — a personal Webinar. In that one hour, we set up an account, added users, configured preferences, created new matters, and added contacts. We added some notes to the file and drafted some documents that we uploaded and linked to the file. We went to the Agenda and added tasks to our task list and scheduled activities. We added time and expenses to our matters, created a bill, and even received payments.

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All of this was done in a relatively leisurely one-hour — a stunning achievement. The tagline of Clio is "Practice Management Simplified." This captures the essence of Clio. All of the basic tasks that constitute legal practice management are presented to the user in an elegant, cohesive, and intuitive system.

In reviewing the system I thought of my brother-in-law, Nathan, a solo practitioner with two paralegals. His practice is a mix of personal injury, real estate, immigration, and criminal law cases — high volume, but small documen-

tation with an active calendar and extensive notes to file. Nathan has no time to learn, configure, and support a full-blown client-server system. Clio would be perfect for him. At $49/month for each attorney, $25/month for each paralegal, Clio would cost him $100/month. All he would need is three computers connected to the Internet; he would not need a network, a file server, or any software on his desktop other than Microsoft Office and an email client.

If you are still using Excel to manage your time sheets and Outlook to manage your calendar and tasks, you should look closely at Clio. If you have a "workgroup" with all your files shared in the "My Documents" on a "John's Computer," you should look at Clio. If your concept of automated backup is a USB attached hard drive, you should look at Clio. If you don't want to pay for the services of expensive consultants like myself, you should look at Clio.

EXTENDED TOUR
Adding Users
Signing up is as simple as a Web form and a credit card. You add users by sending them an email. When the user confirms the email, you can then edit the user profile to include name and address. Since you are billed for each active user, you need to define the subscription class of each user: attorney or non-attorney.

Adding Contacts
You will want to import your address book from Outlook as the first step, before you do anything. Luckily, it's easy. In Outlook, choose File -> Export as CSV. In Clio, choose Contacts -> New Person -> Upload from vCard, Outlook, or Amicus Attorney. Choose the format, select the file, and click

on Upload. Once you've imported your contacts, you can start adding notes and creating matters.

Adding contacts through Clio is easy and intuitive. Clio enables you to add multiple addresses, emails, phone numbers, and Web sites for each contact. A contact can then be related to other contacts or matters. And you can add unlimited notes about each contact.

Adding Matters
Matters are the core of every legal case management system. Clio takes a Spartan approach to matter form. Matter detail is limited to name, description, practice area, open/close date, status, and location. However, the matter is the central organizing principle of Clio. Clients and contacts can be linked by just beginning to type the name or a portion of the name of the contact. You can view your calendar items and tasks that relate to a matter, as well as any notes to the file, time entries, or expenses, and even documents.

Adding Documents
Clio offers a basic document management system in which you can upload files and manage versions of that file. To use this feature, you still need to save the file on your computer first. You then browse to the file from within Clio and click upload. To create a new version, you simply download the file, make your edits, and then submit the file to upload it back to the system. The process could be simpler and more closely integrated with your word processor.

Document Sharing With Client-Connect
How many times have you wanted to securely send a document to a client or a bill? Rather than emailing the client, Clio enables you to share

any document with designated individuals. To do so, simply click on the ClientConnect button and choose the contact. The client will receive a notification and a link.

Managing Your Agenda
The first item you see when you log into Clio is your Agenda. Your agenda consists of your open tasks and your events for the current day. You have the ability to filter your task list by due date, but you cannot set any priorities.

Working With the Calendar
The calendar interface is elegant and functional, especially given that it resides entirely within a browser. It can display the calendars of other users, but the calendar does not make it clear which user is associated with which calendar entry.

For those who are wedded to Outlook, whether for personal preference or for links to BlackBerry devices and mobile phones, you should look at Calendar Feeds. These feeds give Outlook the ability to pull your public calendar from Clio and merge it with your personal calendar.

Timekeeping With Clio
Clio takes a fairly simple approach to billing. All billing is presumed to be hourly. And, in an interesting twist, different types of tasks can have different hourly rates. I am accustomed to having different clients at different hourly rates according to a rate schedule. The actual process of creating a time entry is intuitive and can be done from either the matter or the activities tabs.

Billing and Accounting
Quick disclaimer: I am neither an accountant, nor a billing specialist.

Clio enables you to generate bills, based on time entries and expense records. It enables you to set up trust accounts, receive payments, and apply payments to bills. You can add your logo to the invoice and add custom messages.

With ClientConnect, you can send the bill to the client for payment via check or PayPal. Such bills are certainly a major improvement over Excel. The ability to track billing history and payments will bring order to chaos.

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SOME AREAS OF IMPROVEMENT
What Clio has done with the cloud is truly simplify the process of practice management. The company has built a powerful cloud-based offering that is truly easy to use, easy to setup, and easy to support.

However, if you are looking for Time Matters, Amicus Attorney/Accounting, or PracticeMaster/TABS in the Cloud, you will not be satisfied with Clio at the present time. Come back in a year and try it out and you may well find more advanced features.

Here are a few specific areas where improvement is warranted:

Import/Export
For now, Clio lacks robust reporting and data export routines. Data is very neatly organized under either a particular matter or a particular contact, but not both. You can view the data on the screen, but you can't export it. You can use your browser's print function, but the result is not very pretty. And importing data is limited to contact data.

Global Search
The internal search engine appears limited to matters, contacts, and tasks; it excludes notes and documents, a significant omission. You can conduct global searches, but not targeted searches (e.g. all records with Nathan as the user, created after January 1, 2009 that mention negligence.)

Basic Billing and Accounting
The calendar and tasks are not linked to the bill slip generation; it would be great if you could bill a task, event, or document automatically upon completion. The bills seem to focus on task-type based billing, rather than the more common, staff based billing. Nothing on the bill gives an indication of which staff member did the actual work being billed.

Customizable Fields
If you want to add custom fields on contacts or matters, you will have to wait for future releases. You can modify lists, like practice area and task description, but you cannot add any additional custom fields to the system.

The developers are open to suggestions for additional fields and will add them as features if there is sufficient demand for such features. If you do not like "plain vanilla — one size fits all," you may need to seek out other solutions.

Workflow and Document Automation
The heart of my consulting business is workflow. So I was disappointed that I could not access the

valuable client data locked in Clio for document merges. At present, the data remains in the Cloud, out of reach of desktop applications like Word.

CONCLUSION

If you are a solo attorney looking for a quick-to-implement solution that will bring order to chaos at the right price, Clio may be for you. From that perspective, I would rate the program 4 out of 5, for its innovative interface and its ease of use.

If, instead, you work with several attorneys, and have a specialized practice with need for workflow, custom intake forms, and document automation, I would advise that you wait for future releases.

CLIO'S RESPONSE

We invited Clio to respond to this TechnoFeature. Jack Newton, President of Themis Solutions Inc. (maker of Clio), responded as follows:

Thanks very much for the balanced and informative review Seth.

With respect to billing, Clio can be customized to reflect the responsible timekeeper by indicating that person's initials in the activity description. Overall, we've tried to make the billing as flexible as possible so it can accommodate both flat-fee and hourly billing.

You'll also be glad to hear we have a number of initiatives in progress that will address several of the feature suggestions you've made. First, we're hard at work integrating with third-party products and opening up a development API so a wide range of applications can be developed around Clio. This API will allow third-party developers, system integrators, and consultants such as yourself to develop Clio-based applications tailored to a firm's specific needs. These applications could include custom exports and document workflow automation.

Clio is still young, and we're continuing to improve and develop it based on feedback from our customers and reviews like this. Thank you.

Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems, has helped many law firms build customized practice management and workflow solutions. Please feel free to visit his blog for the latest on document assembly and practice management. Basha Systems currently offers consulting services in Time Matters, HotDocs, and Amicus Attorney.

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