

The Intelligent Legal Work Platform

Discover why 400,000+
legal professionals choose Clio.





No one else brings it all together

For too long, the
business of law and the
practice of law have lived apart.

Clio unites them with the first and
only **Intelligent Legal Work Platform.**



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I could not imagine running this firm without Clio. I would be spending half of my day on administrative tasks. It would not be productive. If you're considering adopting Clio, it's simple. Do it. Do it yesterday.

KARINE E. SOKPOH

402 Legal

Grow

BRING IN NEW CLIENTS

Attract, nurture, and retain new clients in one automated marketing and intake solution.

Get more clients. Build stronger relationships.

- **Email marketing:** Send emails that build stronger relationships and help close new clients or drive repeat business.
- **Website builder:** Deliver a great first impression right out of the box with everything you need to create a secure and professional website in minutes.
- **Google's Local Services Ads for Clio:** Attract highly-qualified leads by appearing when clients in your area are searching for the legal services you offer.

All information provided here will remain confidential. ✕

Hello and welcome to Modern Legal Planning. How can we help you?

Criminal defense

Car accident

Immigration

Estate planning

Divorce

General inquiry

Thank you, how can we help you today?

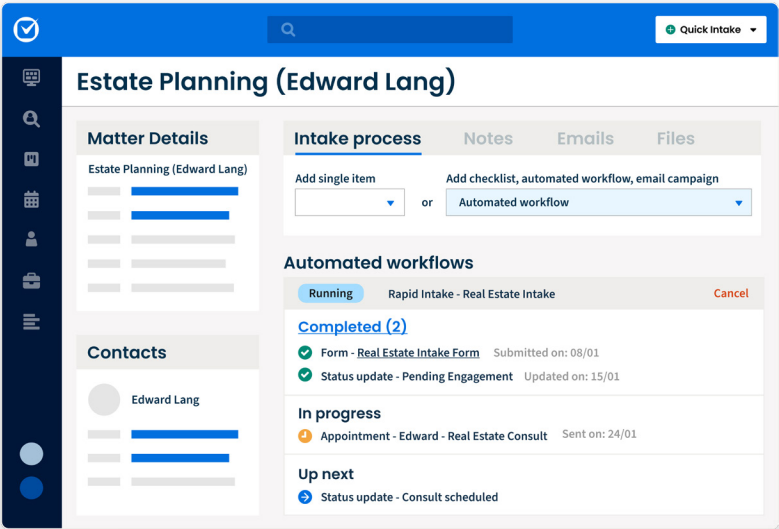
I'm planning to file for divorce and need a lawyer

10:56 AM

I can assist you with that. Could you please provide your full name so we can get started?

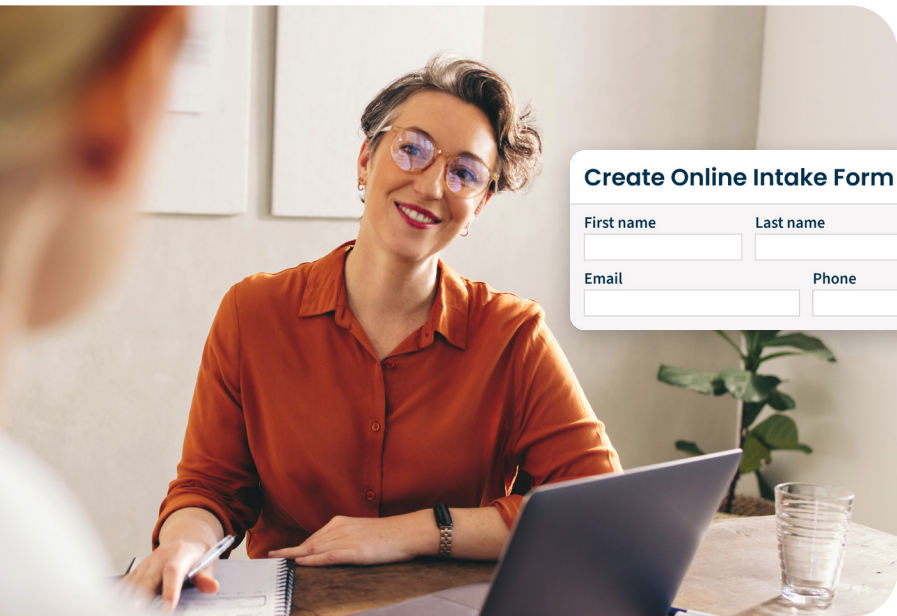
Optimize how you intake clients.

- **Legal CRM:** Save hours in client intake. Organize, manage, and track the progression of potential new clients all from one dashboard.
- **Automated client intake:** Avoid back-and-forth and duplicate data entry with online intake forms and appointment scheduling with built-in reminders.
- **Pipeline performance insights:** See where new clients are learning about your firm to know where you’re seeing the most results.



AI-powered marketing and client intake.

- **Lead nurture:** Never miss an opportunity with AI that responds to potential clients 24/7.
- **Intake follow-up:** Move new clients forward faster with automated follow-ups for every lead.
- **Lead assessment:** Fast-track client intake with built-in intelligence that gathers lead details and evaluates fit so you can prioritize.





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If a firm isn't
using Clio,
they're being
left behind.

JACOB STACY
Medina McKelvey

Manage

RUN YOUR FIRM

Connect everyone and everything across your firm.

Get paid faster. Know where every dollar goes.

- **Smart legal billing:** Speed up client billing with instantly-payable bills, built in minutes and sent by email, text message, or secure client portal.
- **Legal and trust accounting:** Manage your money with confidence using accounting built for legal professionals and built into Clio Manage.
- **Online payments:** Improve your collection rates and firm efficiency with a built-in online payment processing solution.

The screenshot displays the Clio Manage web application. The main interface has a blue header with the Clio Manage logo, a search bar, and a 'Create new +' button. A sidebar on the left contains navigation icons. The main content area shows a 'Transactions' table with columns for Actions, Status, Client, and Description. The table is filtered by 'Authorized' status. Overlaid on the right is a 'Payment to Waverly Law' modal. This modal shows a 'Total amount due' of \$1,500, a 'Payment amount in USD (\$)' of \$1,500, and a 'Balance after payment: \$0.00'. It also includes a 'Bill Details' section with columns for Issued date, ID, and Amount. At the bottom of the modal, there are payment options: Debit, Credit, Apple Pay, and Pay Later (which is highlighted with a blue border). Below these options are fields for 'Debit card number', 'Expiry date' (MM / YY), 'Security code', and 'Name'.

Actions	Status	Client	Description
	Authorized		
	Completed		
	Failed		
	All		

Payment to Waverly Law

Total amount due
\$1,500

Payment amount in USD (\$)
\$ 1,500

Balance after payment: \$0.00

Bill Details		
Issued date	ID	Amount
		\$1,500
		\$2,000

Debit card number

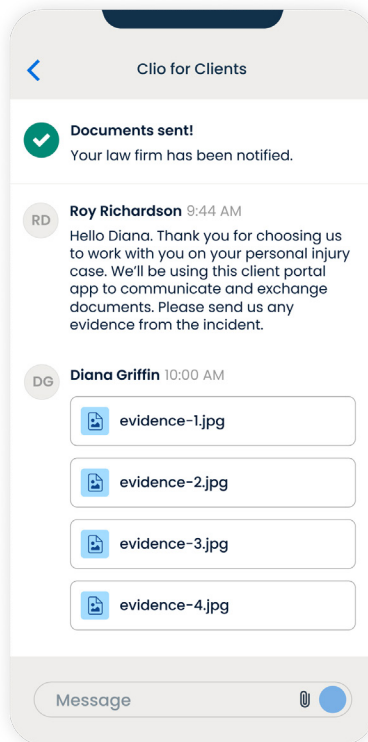
Expiry date
 MM / YY

Security code

Name

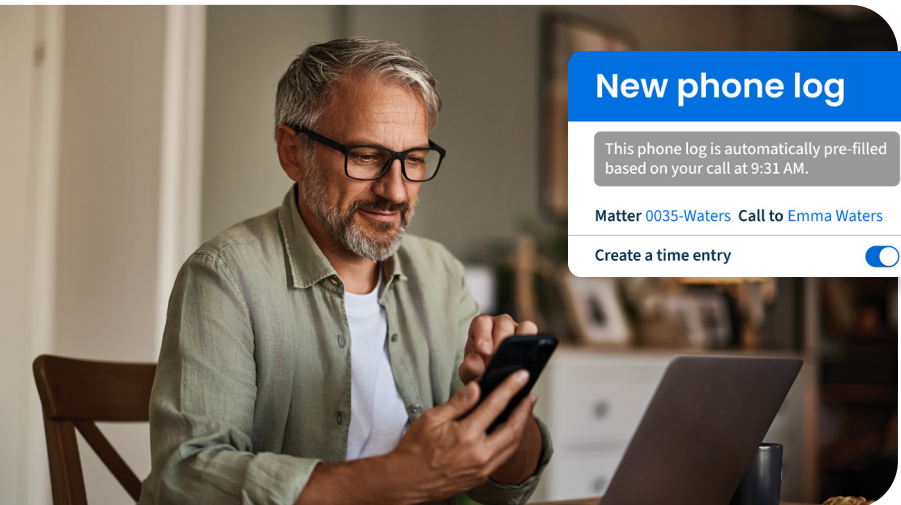
Deliver service your clients will remember.

- **Secure client portal:** Offer a client-attorney communication portal that centralizes communications and ensures security.
- **Secure messaging and texting:** Communicate by text message, email, phone, and more. Save it all in one place and connect them all to the correct matters.
- **Document sharing:** Create, access, and share your matter-related files right from your desktop, and securely sync them to Clio.



Stay organized, move work forward with automation.

- **Unified case and document management:** Keep every matter's details, documents, and communications connected in one place for faster, more accurate work.
- **Coordinated tasks and scheduling:** Bring tasks, deadlines, and court-driven timelines together so your team always knows what's next and when it's due.
- **Mobile productivity anywhere:** Access case files, calendars, and firm activity on the go to stay responsive and keep work moving.
- **Workflow automation:** Use templates and automated workflows to reduce manual steps and move cases forward with greater consistency.
- **Actionable business insights:** Monitor operational and financial health with dashboards, custom reports, and matter progress indicators to make confident decisions.



New phone log

This phone log is automatically pre-filled based on your call at 9:31 AM.

Matter 0035-Waters **Call to** Emma Waters

Create a time entry



AI-powered outcomes, not just outputs.

- **Automated scheduling:** Extract dates directly from court documents like scheduling orders and create calendar events automatically.
- **Matter recommendations:** Receive specific actions for you to take on a matter at the exact right time.
- **Intelligent billing:** Drafting invoices, approval routing, and reminders are handled for you meaning fewer errors, faster cash flow, and less manual back-and-forth.
- **Client communications:** Never miss the right moment to update a client with automatically drafted client messages based on recent matter activity.



Extracting events

Scanning the scheduling order



Finding key events



Calculating dates



Setting up draft events for review



[Draft communication](#)

Did you know that the use of technology can reduce mental strain by up to **25%**, which in turn offers benefits to both productivity and personal well-being?



Download the full research report at clio.com/ltr.



Clio's AI has been such a game-changer. It has turned hours of manual work into minutes of review. It's so powerful and intuitive that it has not become just a time-saver for me, but a sanity-saver.

AMY PANKRATZ

Birkholz Law

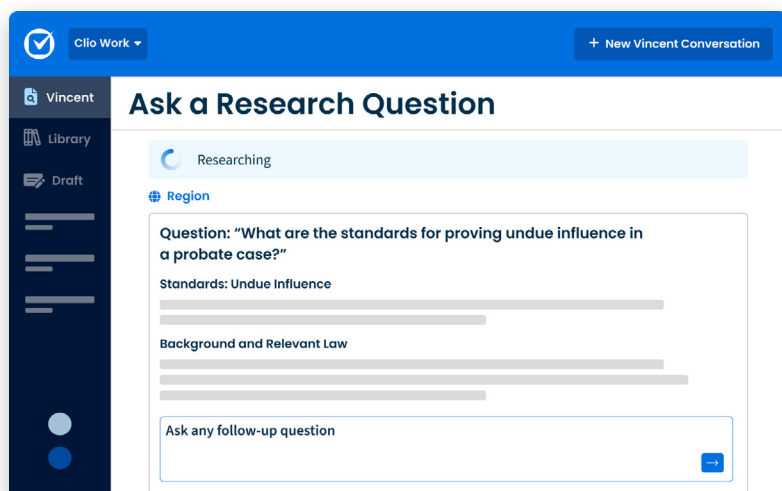
Work

ACCELERATE LEGAL WORK

The first and only AI that understands your cases, their context, and the law to deliver research, analysis, and strategy you can trust.

Authoritative intelligence you can trust.

- **Legal library:** Access to the world's largest global law library, updated daily with verified judgments, legislation, and regulatory materials.
- **Matter-aware research and reasoning:** Connect facts from your documents, notes, communications, tasks, and deadlines to deliver research, reasoning, and defensible strategies rooted in the full context of your case.
- **Cited answers:** Ask questions naturally and get precise, cited answers that tie together your matter details and authoritative sources.



AI that transforms case knowledge into strategy.

- **Document and recording analysis:** Understand documents, transcripts, and recordings at a glance with fast identification of claims, obligations, facts, issues, and risks.
- **Pre-work automation:** Turn matter context into structured insights like timelines, legal issues, and client-ready explanations so you never start from scratch.
- **Cross-platform intelligence:** Keep the facts, issues, and analysis uncovered by AI synced to your matter in Clio Manage.



AI Actions



Take action

Explore legal proposition

 Legal Work

What are the standards for proving undue influence in a probate case in this state?

[Review findings](#)

Draft

SCALE LEGAL WORK

Move from first draft to final version faster, with less manual work and more confidence in every detail.

Take control of your time—ditch your tedious document tasks.

- **Document automation:** Automate everything from client information gathering to legal document drafting.
- **Court forms:** No more hours wasted hunting for forms. Get instant access to thousands of official court and immigration documents.
- **Document sets:** Work on your whole case at once by populating sets of documents in just a few clicks.
- **AI-powered questionnaires:** Skip the endless client email chains. Questionnaires auto-generate, send, and collect the information you need.
- **Conditional logic:** Adjust pronouns and verbs to agree with client-specific details, add or remove clauses based on case information, and more.

Select documents to build a questionnaire

Sets Court Forms Word Templates

Set Name

▼ Uncontested Divorce Added

- Attachment to Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act
- Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act
- Summons (Family Law)
- Declaration of Disclosure (Family Law)
- Schedule of Assets and Debts (Family Law)
- Property Declaration (Family Law)
- Income and Expense Declaration

Selected Documents

Uncontested Divorce

- Petition for Dissolution of Marriage
- Attachment to Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act
- Declaration Under Uniform Child Custody Jurisdiction and Enforcement Act
- Summons (Family Law)
- Declaration of Disclosure (Family Law)
- Schedule of Assets and Debts (Family Law)
- Property Declaration (Family Law)
- Income and Expense Declaration

Build Questionnaire

Full Name

Deanne Spadina

Street Address

2697 Anza Trail

City

Palm Springs

State **Zip Code**

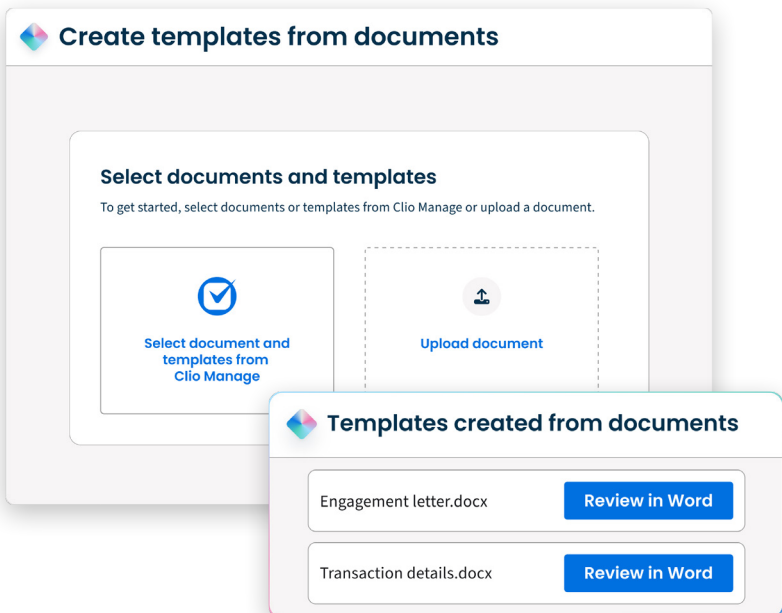
California 92264

Details

Save & Exit Next

Start drafting faster.

- **AI-powered template builder:** Let AI do the heavy lifting for you, building a library of templates tailored to your firm's expertise and style.
- **Microsoft Word Add-in:** Create and manage reusable templates from Word documents by adding custom variables, clauses, and conditional logic.
- **Standard template library:** Start drafting faster with templates made for you, or ready-to-use standard templates.



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As general manager, there are a lot of things that I oversee—from human resources to facilities to marketing technology—and in order to keep organized, be efficient, and be where I need to be, I have to use Clio.

KIMBERLY MULLINAX

King Law

Impact that
speaks for itself

275%

revenue growth

KING LAW

20%

increase in new clients

PALACE LAW

2X

growth in billable hours

SPRUNGER & SPRUNGER

90%

reduction in admin time

GASPARYAN LAW FIRM

AI built for real legal work

AI is moving fast. Clio makes it practical from day one because it's designed for how firms actually work.

Proactive

AI that doesn't wait for prompts. It helps move work forward automatically.

Integrated

Built directly into Clio workflows. No extra tools or switching systems.

Verifiable

Transparent
outputs with citations
and audit trails you
can trust.

Secure

Your data stays
in Clio and is
never exported to
external platforms.

The result is AI that feels reliable, contextual,
and effortless. It amplifies your expertise,
rather than adding another tool to manage.



Work the way you want, with the tools you want

Seamlessly integrate with your preferred email, video conferencing, virtual receptionist, and more. Clio connects to over 250 of the legal industry's most popular apps and works as your central source of truth and operating system. Plus, an open API affords you the flexibility to build private custom workflows and integrations.



Get support, when and how you need it

Clio provides the people behind the software. Leverage expert assistance from an in-house team of support representatives, available 24 hours a day, five days a week.



Get help through your transition

Clio is a partner invested in your success. From consultation through to onboarding, Clio's solutions engineering and data migrations teams will get you set up for success.



Work reliably and securely from anywhere

Clio provides a financially-backed 99.9% uptime guarantee, along with data security protocols that go beyond industry requirements for professional compliance.



Ready to
learn more?

Visit clio.com
sales@clio.com
1-888-858-2546 EXT. 1

