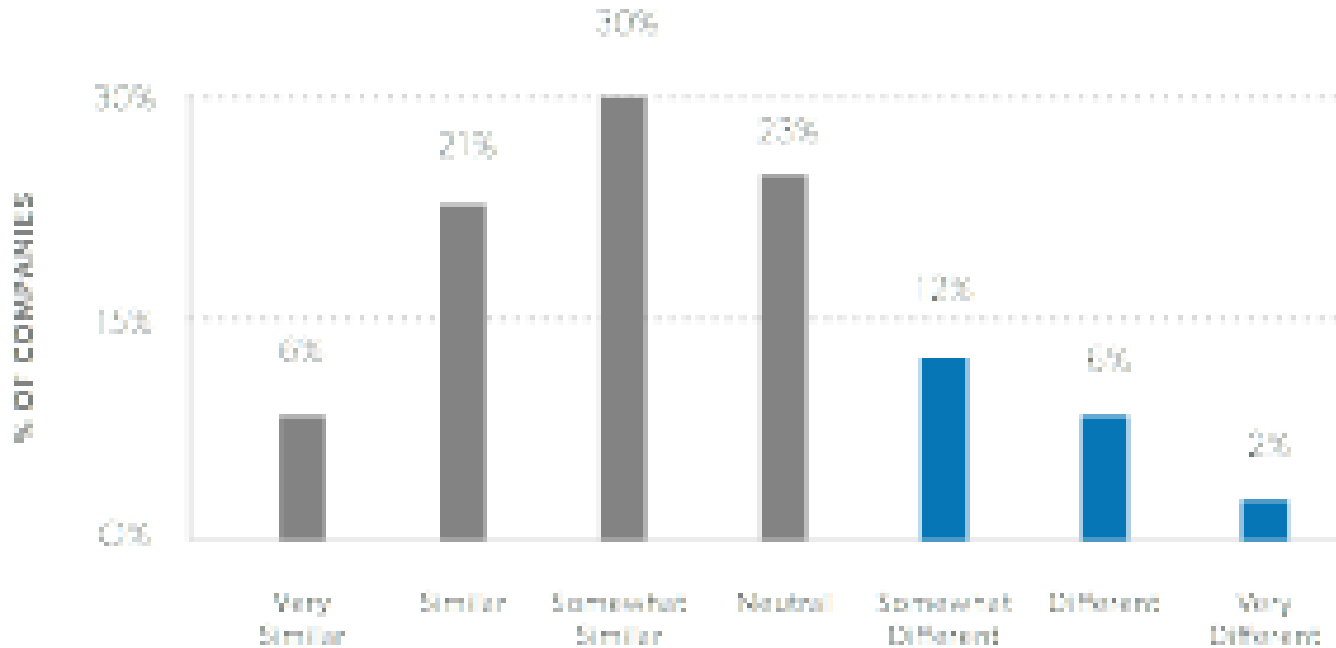


Delivering an Effortless Experience

Jack Newton
Founder & CEO, Clio

Commoditization is a harsh reality for all businesses, including law firms

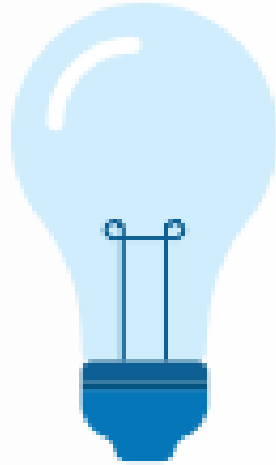


n= 1,500 Customers

Source: CEB Institute

We're in a Promoter Economy





Differentiate with *Service*

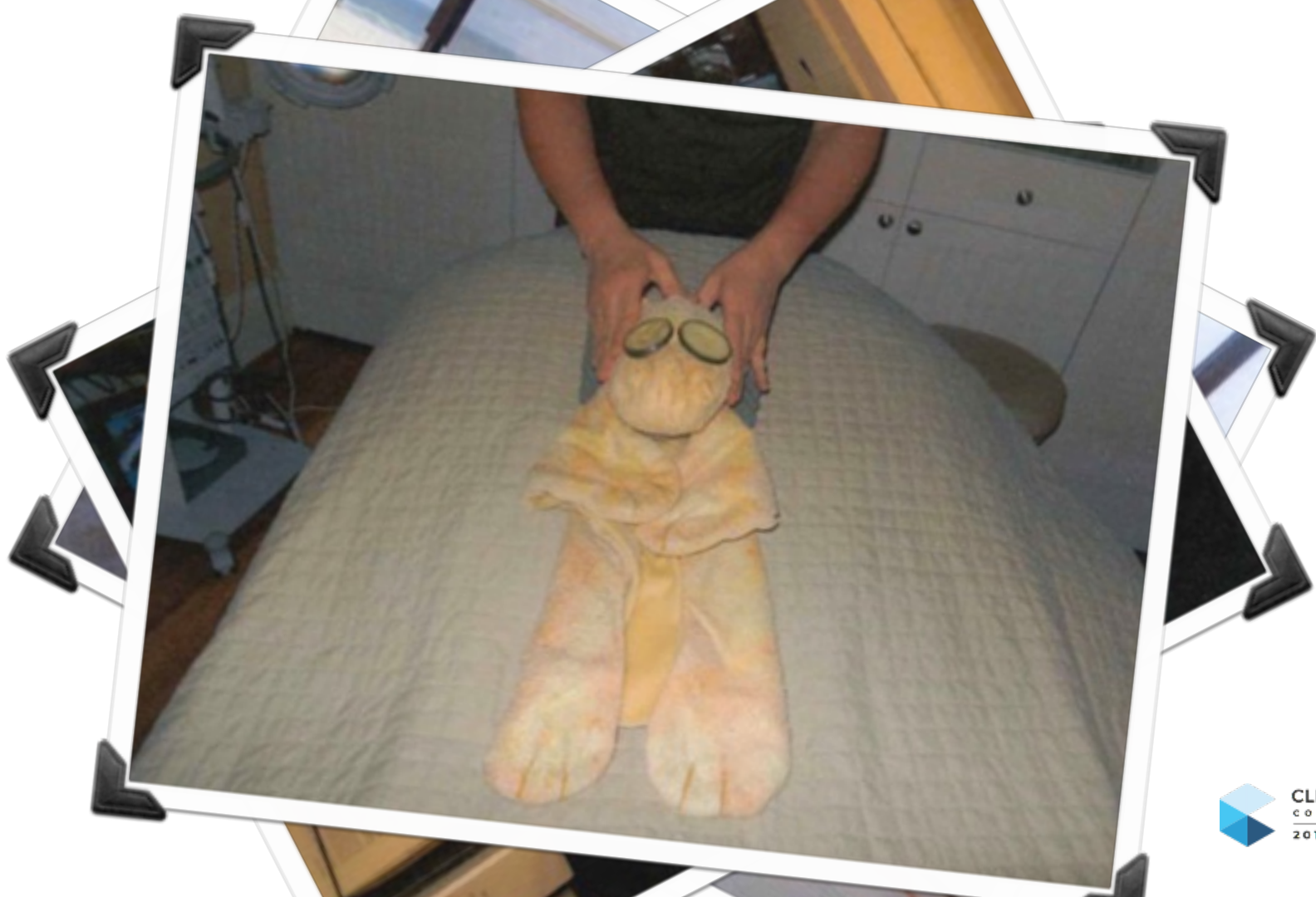
“We're a service company that just happens to sell shoes.”

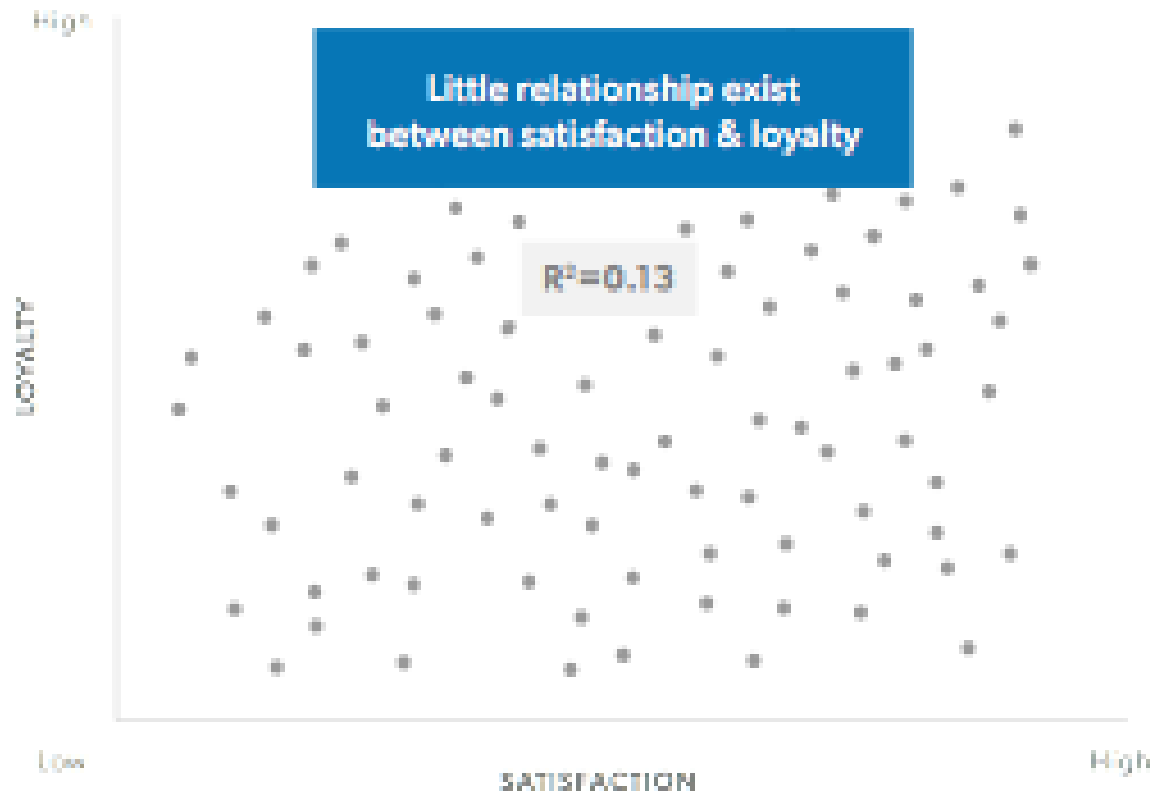


“Your law firm is a service company
that happens to deliver legal advice.”



CLIO CLOUD
CONFERENCE
2015

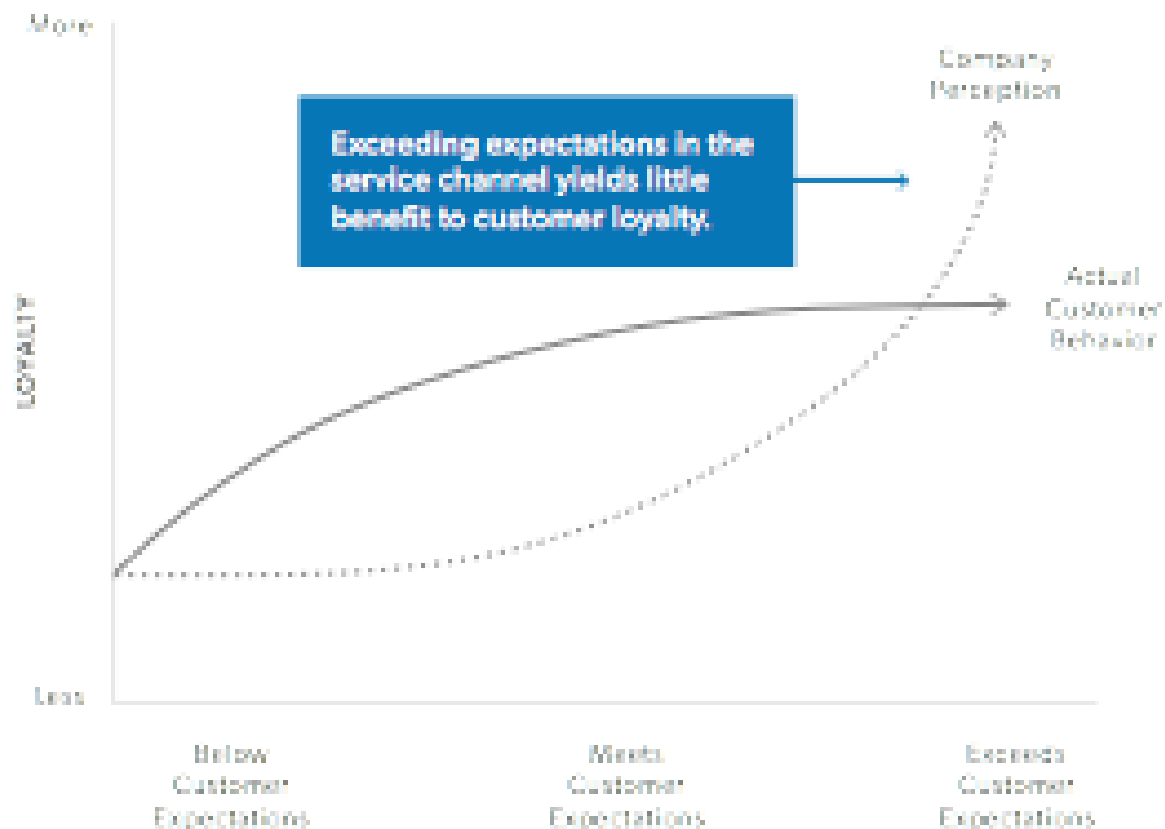




n=37,176 Customers

Source: CEB Institute





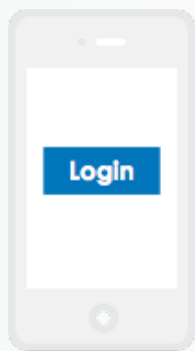
n=97,176 Customers

Source: CEB Institute

The winners in 2016 will win by
creating *effortless experiences*.



UBER



Book Now



Done!



CLIO CLOUD
CONFERENCE
2015

CHASE 

CHASE 

CHASE 

CHASE 





CLIO CLOUD
CONFERENCE
2015

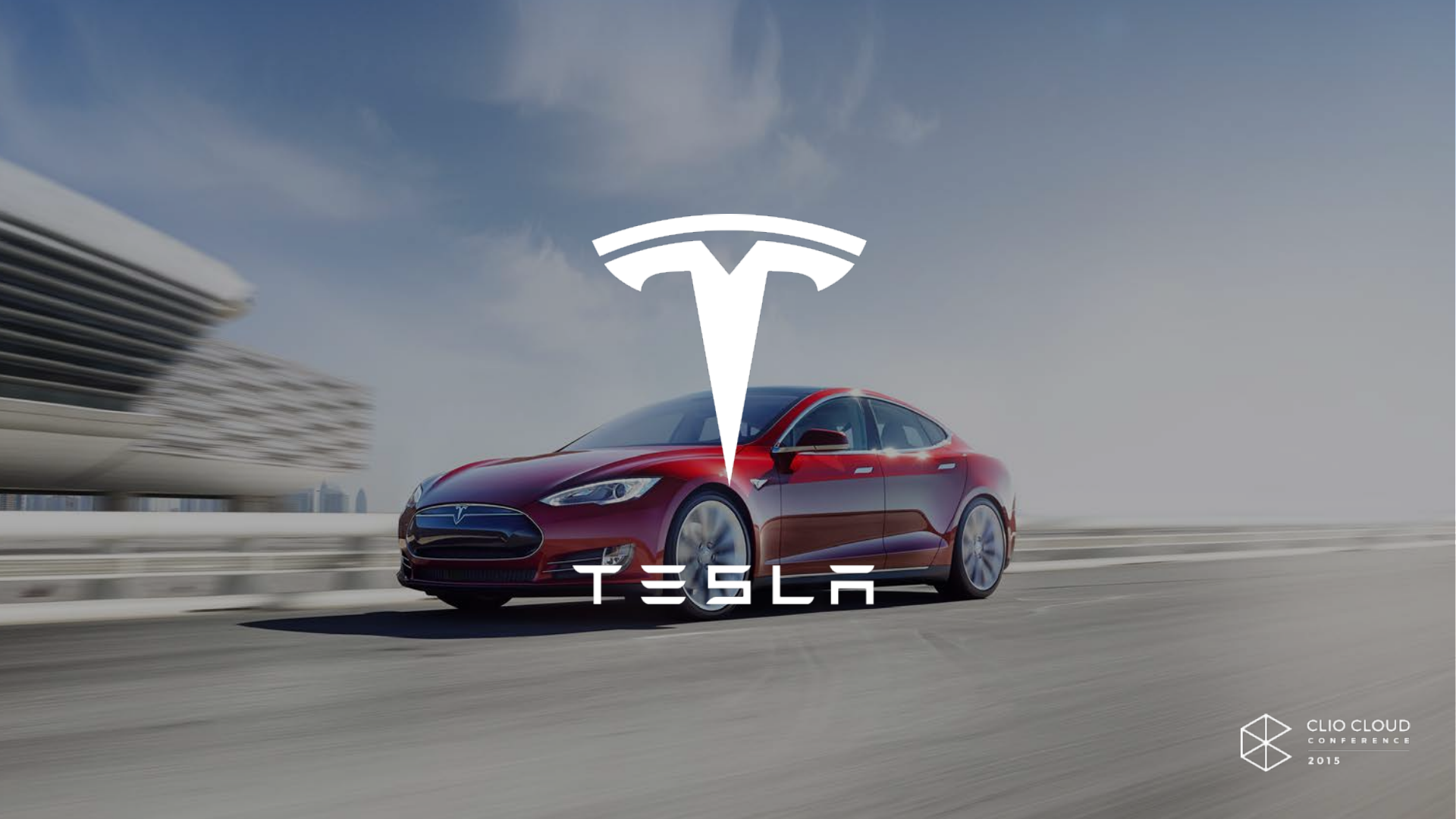
amazon.com[®]



CLIO CLOUD
CONFERENCE
2015

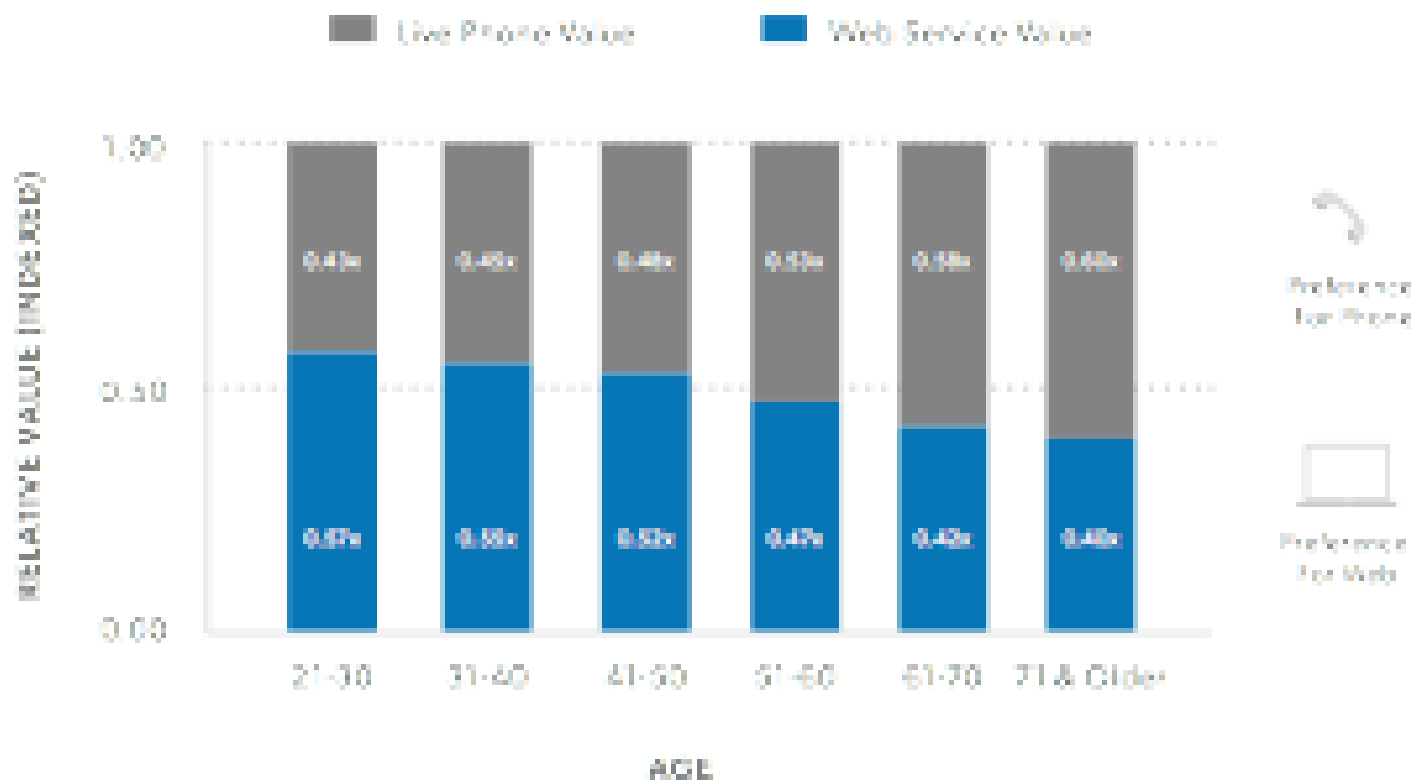






CLIO CLOUD
CONFERENCE
2015

Customer's Expectations Are Shifting



n=879 customers.

1.



LAPTOP

2.



DESKTOP

3.



SMARTPHONE

4.



TABLET

1.



SMARTPHONE

2.



TABLET

3.



LAPTOP

4.



DESKTOP

Customers don't value delight.
They value effortless experiences delivered in
via the medium of their choosing.



“My lawyer delivers a
_____ experience.”

How Clio is helping deliver an Effortless
Experience to you and your clients?

Make it effortless for your clients to find and collaborate with you.

Make it effortless to leverage technologies
that help you grow your practice.

It takes too long for
lawyers to get paid

87 days

To Bill

83 days

To Get Paid



Clio[®] Payments

Powered by LawPay





4313 State Street, Third Floor
 Santa Barbara, CA 93119
 1-888-871-6299
 Fax 1-865-896-8641

Merchant # _____
 Agent Name _____ Agent # _____
 Agent Phone _____ Agent Director _____

BUSR

Merchant
 Legal ID
 City, St
 Business
 Customer

MERC

Type of
 Govt
 Private
 Maxims
 Has Ad
 Account
 Has App
 Yes
 No

MERC

Merchant
 Has Ad
 Account
 Has App
 Yes
 No
 Deposits
 Merchant
 Has Ad
 Account
 Has App
 Yes
 No

PRIN

Name
 Address
 Name
 Address
 Name
 Address

PRIN

Name
 Address
 Name
 Address
 Name
 Address

NON-

4313 State Street, Third Floor
 Santa Barbara, CA 93119
 1-888-871-6299
 Fax 1-865-896-8641

Merchant # _____
 Agent Name _____ Agent # _____
 Agent Phone _____ Agent Director _____

BUSR

Merchant
 Legal ID
 City, St
 Business
 Customer

MERC

Type of
 Govt
 Private
 Maxims
 Has Ad
 Account
 Has App
 Yes
 No

MERC

Merchant
 Has Ad
 Account
 Has App
 Yes
 No
 Deposits
 Merchant
 Has Ad
 Account
 Has App
 Yes
 No

PRIN

Name
 Address
 Name
 Address
 Name
 Address

PRIN

Name
 Address
 Name
 Address
 Name
 Address



4313 State Street, Third Floor
 Santa Barbara, CA 93119
 1-888-871-6299
 Fax 1-865-896-8641

Merchant # _____
 Agent Name _____ Agent # _____
 Agent Phone _____ Agent Director _____

BUSINESS NAMES**MERCHANT APPLICATION**

Merchant's Legal Business Name (for Sole Proprietorships, enter Principal's name)		Using Business As? Name (this name will appear on customer's receipt)
Legal Mailing Address		Business Address / Physical Street Address (no P.O. boxes)
City, State, Zip		City, State, Zip Country
Business Telephone	Contact Name	Business Website (required for Trinity Program)
Customer Service Phone	Business Fax	Business Owner's E-Mail (required)

MERCHANT PROFILE**VISA / MASTERCARD / DISCOVER® NETWORK INFO**

Type of Ownership: <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Non-Profit <input type="checkbox"/> Govt <input type="checkbox"/> Tax-Exempt <input type="checkbox"/> Trust/Trustee/Asst <input type="checkbox"/> Legal/Medical Corp <input type="checkbox"/> Other	Merchant Type: <input type="checkbox"/> Retail <input type="checkbox"/> Retail w/Tip <input type="checkbox"/> Service <input type="checkbox"/> Restaurant <input type="checkbox"/> Mail/Phone <input type="checkbox"/> Fast Food <input type="checkbox"/> Internet <input type="checkbox"/> QSR <input type="checkbox"/> Utility <input type="checkbox"/> Convenience <input type="checkbox"/> Public Sector <input type="checkbox"/> Lodging <input type="checkbox"/> Business-to-Business	Visa/MC/Discover Network Sales Profile: Retail, Card Swiped: _____ % Retail, Manual Keyed: _____ % Internet: _____ % Mail/Phone Order: _____ % TOTAL (not to 100%): _____ %
Maximum Monthly Volume: Average Ticket High Ticket	Business-to-Business: <input type="checkbox"/> B2B _____ % <input type="checkbox"/> B2C _____ %	

Has Applicant ever accepted credit cards? <input type="checkbox"/> Yes <input type="checkbox"/> No Name of Processor: _____ Former Merchant ID(s): _____	Mail, Telephone or Internet Sales: Who performs product/service fulfillment? <input type="checkbox"/> Merchant <input type="checkbox"/> Vendor/Fulfillment House Vendor/Fulfillment House Name: _____ Address: _____ Phone: () _____
Has Applicant ever had a previous credit card processor terminate its merchant account? <input type="checkbox"/> Yes <input type="checkbox"/> No (If Yes, by whom? _____ additional pages if necessary)	Does Merchant use third party to store, process or transmit cardholder data? <input type="checkbox"/> Yes <input type="checkbox"/> No Third Party Name: _____ Address: _____ Phone: () _____
Number of Days 3rd Party Product/Service is Delivered: <input type="checkbox"/> Shipping Date <input type="checkbox"/> Other (specify): _____	Federal Tax ID Number (if digit) (T-SSN if Sole Proprietor) _____ Number of Locations: _____ Years Open: _____ Business Hours: _____ Seasonal Months: _____






Depository Bank Name: _____	Checking Account # (CCA) _____	ABA Routing # _____	Branch City/State _____	Contact Name: _____	Phone #: _____
-----------------------------	--------------------------------	---------------------	-------------------------	---------------------	----------------

PRINCIPALS (Partners, Owners or Officers)					
Name: _____	Title: _____	Date of Birth: _____	Applicant's SSN: _____	Home Phone: _____	Cell: _____
Residence Address: <input type="checkbox"/> Own <input type="checkbox"/> Rent _____	City: _____	State: _____	Zip: _____	Years at this address: _____	% Equity Ownership: _____
Name: _____	Title: _____	Date of Birth: _____	Applicant's SSN: _____	Home Phone: _____	Cell: _____
Residence Address: <input type="checkbox"/> Own <input type="checkbox"/> Rent _____	City: _____	State: _____	Zip: _____	Years at this address: _____	% Equity Ownership: _____

BUSINESS TRADE SUPPLIER REFERENCE			
Name: _____	Account Number: _____	Contact Name: _____	Phone: _____

MERCHANT SITE SURVEY REPORT (MUST Be Completed by Account Executive)

Clio Payments

 Clio LLP Attorneys at Law Clio Apps |     Search your practice

Practice Calendar Tasks Matters Contacts Activities Bills **Accounts** Documents Communications Reports Sidebar ▾

Operating Account 0 [EDIT](#) [DELETE](#)

Details

Balance	-\$3,446.00	Domicile Branch	-
Account Number	-	Swift	-
Institution	-	Account Holder	-
Transit Number	-	Account Type	Operating Account
LawPay Account	Operating		

Transactions **Clio Payments History**

Date	Bill	Client	Credit Card	Gross Amount	Authorization Code	Status
10/17/2015 2:35 PM	1610	Howe Group	Visa ending with 4242	\$6,284.00	R4H0XI	AUTHORIZED
Void						
10/17/2015 2:35 PM	1610	Howe Group	Visa ending with 4242	\$6,000.00	PFAKEE	AUTHORIZED
Void						
10/17/2015 2:35 PM	1610	Howe Group	Visa ending with 4242	\$4,000.00	N6SFJE	AUTHORIZED

AGENDA

09:30 AM
[Meeting](#)

TIMEKEEPING

No timer running.

RECENT

No recent items.

[Home](#) [About](#) [Blog](#) [Support](#) [Terms](#) [Privacy](#)
© 2015 Themis Solutions Inc.

Start receiving payments in less than 24 hours.

Clio LLP Attorneys at Law Clio Apps | [Icons] [DU] Search your practice

Practice Calendar Tasks Matters Contacts Activities Bills **Accounts** Documents Communications Reports Sidebar

Operating Account 0 EDIT DELETE

Details

Balance	-\$3,446.00	Domicile Branch	-
Account Number	-	Swift	-
Institution	-	Account Holder	-
Transit Number	-	Account Type	Operating Account
LawPay Account	Operating		

Transactions **Clio Payments History**

Date	Bill	Client	Credit Card	Gross Amount	Authorization Code	Status
10/17/2015 2:35 PM	1610	Howe Group	Visa ending with 4242	\$6,284.00	R4H0XI	AUTHORIZED
Void						
10/17/2015 2:35 PM	1610	Howe Group	Visa ending with 4242	\$6,000.00	PFAKEE	AUTHORIZED
Void						
10/17/2015 2:35 PM	1610	Howe Group	Visa ending with 4242	\$4,000.00	N6SFJE	AUTHORIZED

October 2015

SU	MO	TU	WE	TH	FR	SA
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

AGENDA

09:30 AM
[Meeting](#)

TIMEKEEPING

No timer running.

RECENT

No recent items.

[Home](#) [About](#) [Blog](#) [Support](#) [Terms](#) [Privacy](#)
© 2015 Themis Solutions Inc.

Clio Payments

The screenshot displays the Clio Payments interface for a credit card payment. The main window is titled "Credit Card Payment" and is divided into three steps: 1. Payment Information, 2. Billing Information, and 3. Confirm. The current step is "Billing Information".

Invoice #8902

Invoice Detail

Invoice Number	8902
Client	Al Capone
Matter	00012-C
Issue Date	10/02/2019
Due Date	11/01/2019

Select A Billing Address

Al Capone has the following addresses:

- 369 Park Avenue
New York, NY 10016
United States
(Billing)
- 123 Clio Ave.
Burnaby, BC V5H 2H2
Canada
(Home)

[+ Add new billing address](#)

Credit Card Information

Cardholder Name

Al Capone

Card

4242 4242 4242 4242

Expiry Month 02 **Expiry Year** 2019 **CVV** 123

October 2015

MO	TU	WE	TH	FR	SA
28	29	30	1	2	3
5	6	7	8	9	10
12	13	14	15	16	17
19	20	21	22	23	24
26	27	28	29	30	31
2	3	4	5	6	7

Payments

Clio Payments

Date - Matter



Hi John,

Eugene Or has sent you a bill via Clio.

From Eugene Or:

"This is your final bill for the case, John. If you can pay the entire balance, please do. If not, call the office and we will arrange something for you. Thank you."

[Pay Bill](#)

What is Clio?

Clio is a web service that helps lawyers, like Eugene, build a better practice.

[Learn more about how Clio works.](#)



Harvard Business Review

It's not just
what you sell **47%**

53% It's how you
sell it

It's not what.

It's how.

THE END OF LAWYERS?

*Rethinking the Nature
of Legal Services*



RICHARD
SUSSKIND

We're screwed.

OXFORD

TOMORROW'S LAWYERS

An
Introduction
to Your
Future

RICHARD SUSSKIND

There is a profound message here for lawyers—when thinking IT and the Internet, the challenge is not to automate current working practices that are not efficient. **The challenge is to innovate, to practice law in ways that we could not have done in the past**

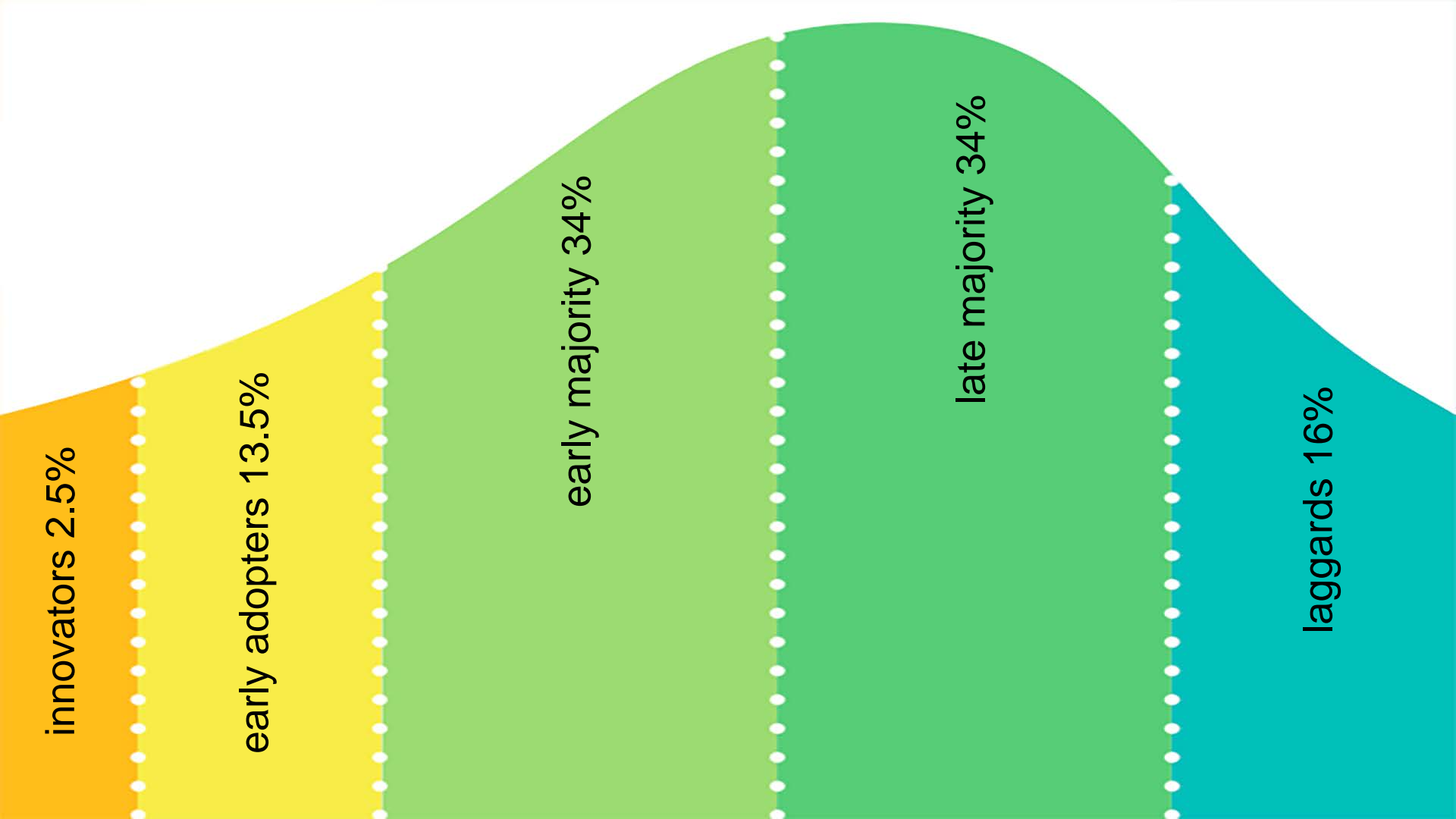


Local Fresh Organic
Produce
Homemade Cakes
Designer Housewares

CLEANING

Opening Hours





innovators 2.5%

early adopters 13.5%

early majority 34%

late majority 34%

laggards 16%



salesforce.com[®]

Success On Demand.



Google Docs

box



netdocuments[®]

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing

Real-time document collaboration

Audit trails

Client portals

Mobile access

Real-time messaging

Video chat

Death to e-mail

Persistent document library

Secure communications

Credit card payments

Online billing



EVERNOTE

Google™ Apps



Clio

box



jack@clio.com

@jack_newton

Thank You.