

How Godoy Law Office Scaled from 6 to 50+ Staff Using Integrated Clio Solutions

Company name: Godoy Law Office

Year Founded: 2011Number of Staff: 50+

Started Using Clio: 2011

Location: Oak Brook, IL, USAFee Types: Flat Fee, Hourly

• Practice Areas: Criminal Defence, Immigration

Impact of using Clio

Firm grew from 6 to 50+ with the support of Clio solutions

Increased efficiency accommodated higher case loads

Streamlined billing and improved collection rates

Godoy Law Office operates a thriving immigration practice and a probate division from its headquarters in Oak Brook, IL. From its very beginnings, the firm prioritized growth—seeking to streamline operations and expand its client base by replacing manual, paper-based processes with a cloud-based legal practice management solution.

The firm started using Clio Manage in 2011, and since then have added Clio Grow and Clio Payments. Together, all three solutions helped the firm grow



from a 6-person team to over 50 employees today. Clio continues to be a trusted partner to Godoy Law, offering scalable solutions that support the firm's growth now and into the future.

The big challenges → and how Clio helped

A manual, paper-based system was inefficient and unsustainable → Clio's cloud-based, legal practice management system offered a solution

Kimberly Clafton, Chief Operations Officer, spearheaded the firm's transition to a paperless system, and when presented with Clio, she didn't hesitate to take it for a test drive. "We needed a true case management system to replace lawyers writing on notepads—and our team needed access to their files whether they were in court, in the physical office, or working from home."

Recognizing the limitations of their existing systems, the firm embraced Clio to unlock new efficiencies and data-accessibility. This proactive approach signaled Godoy's commitment to modernizing their practice and better serving their clients.

<u>Discover how to manage your casework and law firm operations with Clio</u>
<u>Manage</u>

Godoy needed efficiency, scalability, and flexibility in its practice management system → Clio's custom fields



provided the adaptability they were looking for

"Custom fields were our favorite thing."

With a growing client base, the next biggest challenge for Godoy was to find a better way to comb through volumes of case files and client documents, and to do it more quickly and accurately than doing it all by hand.

But they also needed a solution that could accommodate their workflows and technological inclinations. "We don't look at a system and just say this only serves this one purpose," says Kimberly. Godoy made extensive use of Clio's custom fields, "customizing Clio 1,000 different ways" to harness the power of the software. This allowed Godoy to tailor Clio to their specific needs—and to help manage and find detailed case information when they needed it.

See how to customize client intake with Clio Grow

Growth required a better sales process → Clio provided a purpose-built intake management tool

"It's an amazing platform for us at this level of growth."

When it came to bringing new business in the door, managing a larger volume of prospects within a case management system led to a complex workflow. "You can imagine from a case management standpoint, how troublesome that was becoming. We had trouble telling a legal case from a sales case." Kimberly explained.

As the sales department's needs grew with the firm's, Godoy deployed Clio Grow—an intake software that helps organize, manage, and track their new potential clients. Since Clio Grow seamlessly integrates with Clio Manage, Godoy streamlined and optimized their entire client management process



from intake to invoicing and payment—which also helped earn repeat customers.

10 things you need to know about Clio Grow

More sales means more payment headaches → Clio Payments makes online payments easy

> "We use Clio Payments for everything. It's a one stop shop!"

Kimberly says that since adopting Clio Payments, "we have seen nothing but value and ease for our clients, and simplicity for our bookkeeping. Everything is allocated into the appropriate accounts, which empowers our staff to do more."

Since their entire team can access Clio Payments, it saves a lot of extra steps and bottlenecks in the payment process for Godoy. Seeing all of their payment data in one place, instead of having to reconcile accounts every day was also a big win for Godoy. According to Kimberly, Clio payments has amped up convenience for their clients: "It's as easy as – click the link, pay your bill, and you're good to go."

Make it easy for your clients to pay their bills, anytime, anywhere

Additional benefits of using Clio

Help with adoption and onboarding

"I onboard people all over the world—I've never had



an issue with staff understanding and being able to use Clio."

It's one thing to have a great legal practice management system in place, but it can be a challenge to make sure all staff use it to its full potential. Clio offers a free online training academy to help users learn the platform, along with webinars that explore more advanced features.

"Clio academy is a part of our onboarding for every team member—we celebrate them getting certified," says Clafton. She adds that it's great to see lawyers "who are great at lawyering" use Clio to streamline their workflows, save time, and serve their clients even better.

Become a certified Clio Administrator at the Clio Academy

Communication & community

For Godoy, Clio has been an "open book" for two-way communication. Clafton says she can always ask the Clio team for updates in development—and even offer ideas and suggestions of her own for new features. She adds, "I love your announcements—I immediately think about how we can implement new features with the team."

Clio users are also supported by The Law Community, an online space for legal professionals to connect, learn, and support each other. Members share best practices, tips for using Clio, and engage in general discussions about legal practice.

Connect with like-minded community members and thought leaders in The Law Community



Advice for law firms considering Clio

Kimberly emphasizes the importance of future-proofing when choosing a new legal practice management system. She advises: "Don't just think about what's going to solve today's problem—always think about next year, three years, and five years out when you're making decisions."

She also encourages new users to be proactive and unafraid to explore Clio's capabilities. "Always think about the mindset of your firm's leadership team," says Kimberly. If Clio clearly solves a problem or makes their life easier, they'll be open to give it a try—especially if they're in growth mode and thinking long term.

"Jump in, ask the questions, search the features—embrace everything and don't be afraid to test things out."

Clio solutions used

Clio Manage

Centralized case management, enabled efficient organization, automation, and access to case details. Learn more.

Clio Grow

Streamlined client intake by using automating forms, agreements, and communication. Learn more.

Clio Payments

Facilitated online payments, simplified billing and improved collection



processes. Learn more.

Interested in learning more about what Clio can do for your firm?

Book a Demo Today

Getting started with Clio is easy

Clio's cloud-based solutions are free to try, and the company offers a large roster of support, training, and practice management experts. The Clio team has helped tens of thousands of law firms get up and running—including migrating data from other software providers.

To see how Clio can help you manage and grow your firm, <u>schedule a free demo</u> at clio.com, call 1-888-858-2546, or email sales@clio.com.