



Data Driven Productivity with Clio

Clio's Data Driven Productivity Webinar is designed to show you and your firm how to get the most from your data in Clio. In this session we discuss how to work with tracking data and reporting on it efficiently and effectively.

This Document will cover the basics of what is discussed in the Data Driven Productivity with Clio Webinar.

www.clio.com

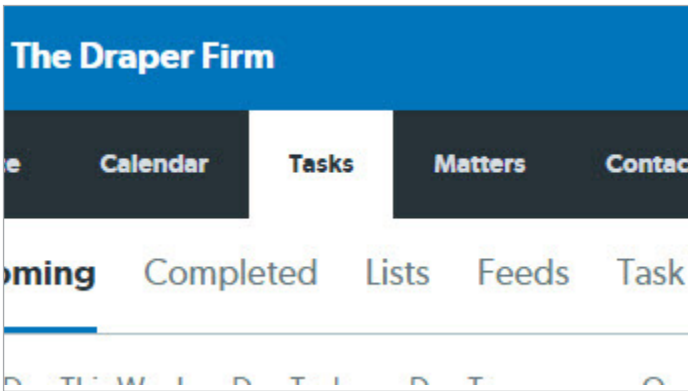
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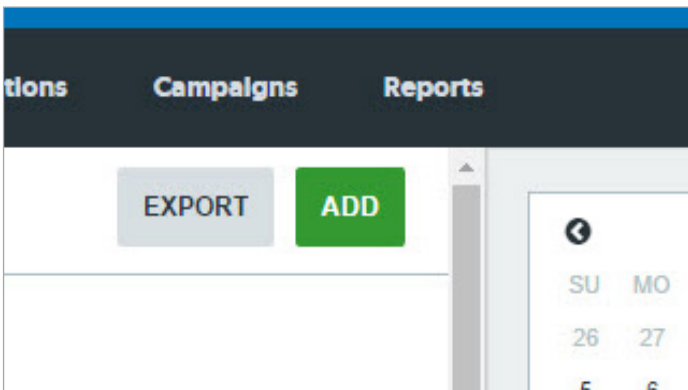
Advanced Tasks

Using Advanced Tasks you can track your to-do items across the firm, and apply time estimates for how long you expect yourself, or your associates, to complete the Task.

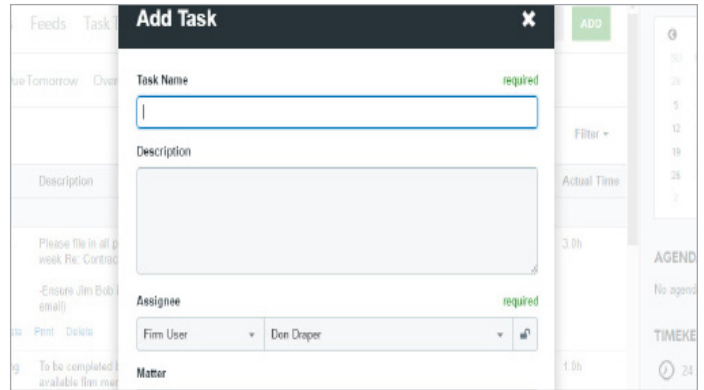
1. From any page in Clio, select Tasks in the top banner. Alternately, select the Tasks sub-tab within a Matter.



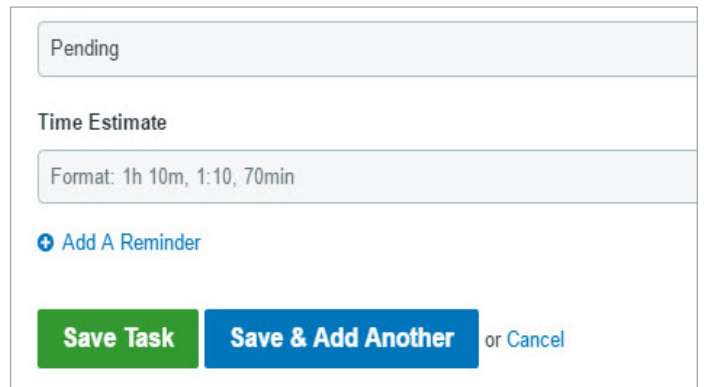
2. Select Add on the right hand side.



3. Track the details of your Task, including the Description and Assignee, down through Priority and Date.



4. At the bottom of the options, select your estimated length of time to complete the Task, and then click Save.

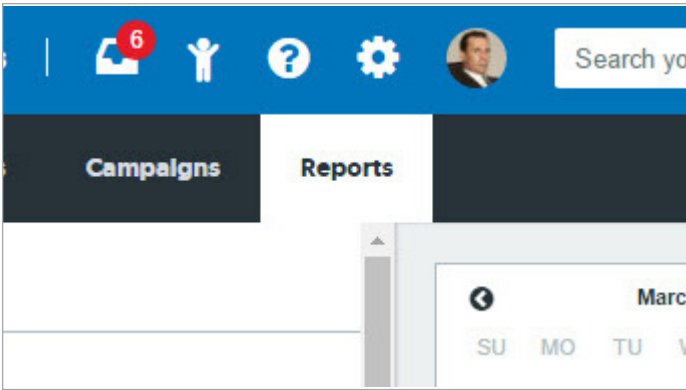


More details can be read in the [Advanced Tasks Support Article](#).

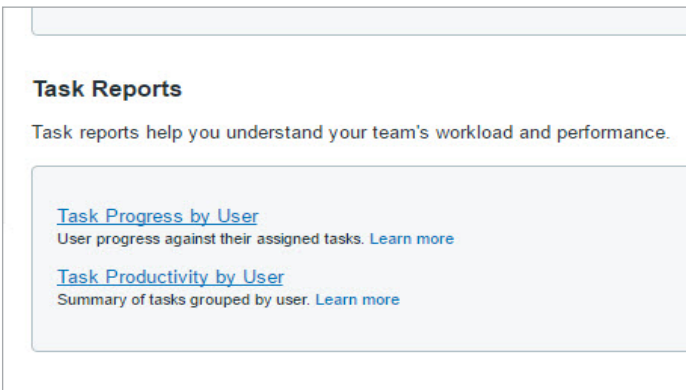
Advanced Reporting

Clio offers a range of advanced Reports, from the Fee Allocation Report, to the Task Productivity and Progress Reports. We will utilize the Task Reports to measure productivity on our assigned Tasks.

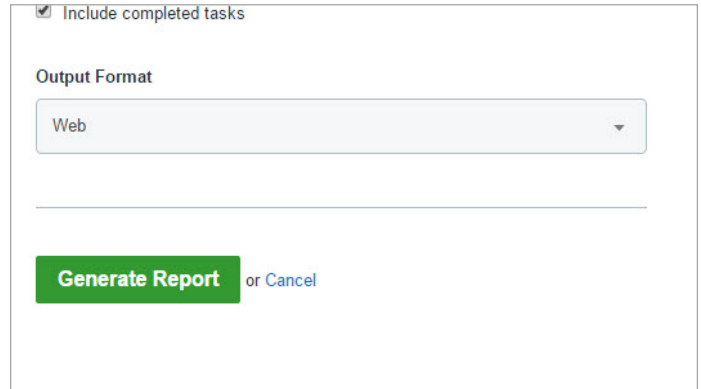
1. Select Reports at the upper right of your page.



2. From the Reports page, scroll down to the Task Reports section.



3. Choose your options, and then click Generate Report.



4. Review the created Tasks and Time Estimates against the amount of time tracked on each Task.

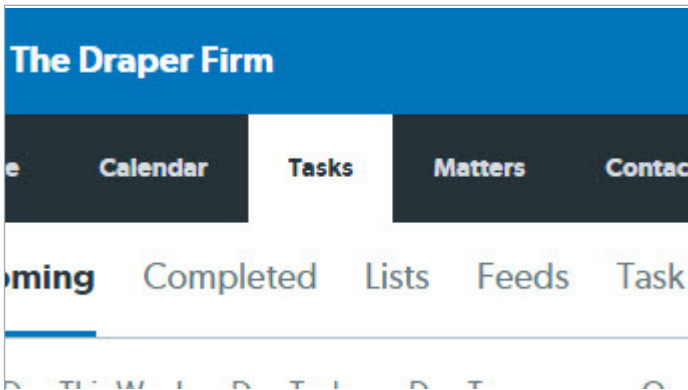
Task Progress by User Report (03/10/2017)				
Filtered by	Type: All	Client: All	Matter: All	Edit Filters
User	Pending	In Progress	In R	
Don Draper	47	9	0	
	27.50h Time Estimate	9.30h Time Estimate	0.00	
	3.20h Actual Time	5.20h Actual Time	0.00	
Pete Campbell	12	0	0	
	0.00h Time Estimate	0.00h Time Estimate	0.00	
	0.00h Actual Time	0.00h Actual Time	0.00	
Peggy Olson	3	1	0	
	0.00h Time Estimate	1.50h Time Estimate	0.00	

More details can be read in the [Tasks Report Article](#).

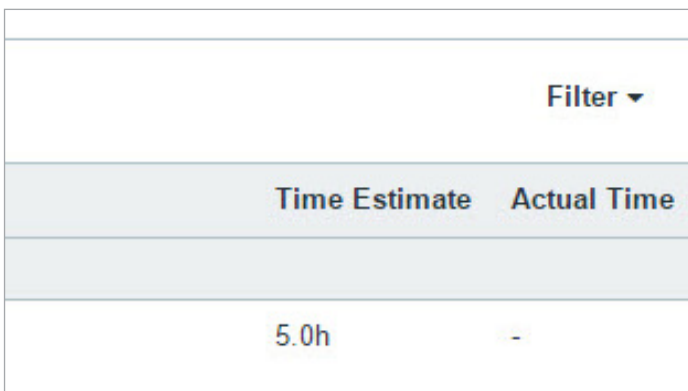
Comparing Reports and Tasks

After reviewing the Task Reports, get more insight on which Tasks are taking longer by viewing the Tasks themselves.

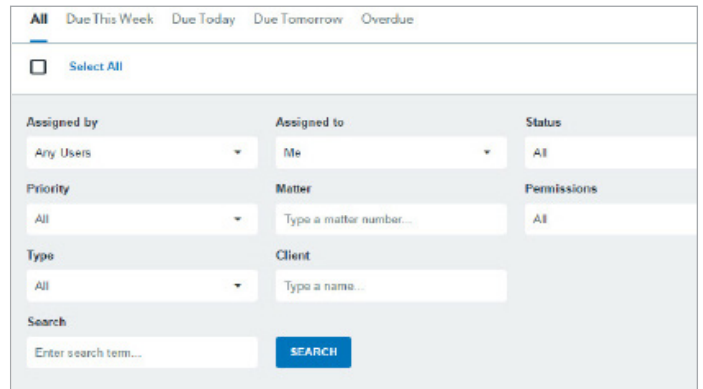
1. Select Tasks at the top of the page.



2. Select Filter on the right of the page.



3. Review your list of Filters. Choose a specific User under Assigned To, or enter a search term.



4. Review your list to see which individual Tasks have taken longer than estimated.

	Time Estimate	Actual Time
	5.0h	0.9h
6 es Adam	2.0h	1.2h
	2.5h	4.3h

26 27
2 3

AGENDA
No agenda item

TIMEKEEPING
⌚ 24 : 59

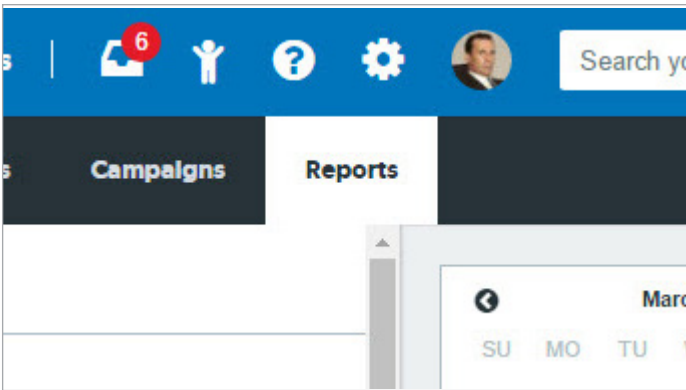
RECENT

More details can be read in the [Advanced Tasks Support Article](#).

Additional Reporting

In addition to the Task Reports, you can create a Fee Allocation Report that determines the bills each attorney has contributed to, the amount of time assigned, and their value based on percentage.

1. Select Reports at the upper right.



2. Scroll down to the Revenue Reports section, and select Fee Allocation Report.



3. Select your filter options, and then click Generate Report.

Select Date Range

All Dates ▼

Output Format

Web ▼

Generate Report or Cancel

4. Review the report to see Billed Time, Collected Time, Billed Outstanding Time, and the percentage of the invoice that the attorney contributed.

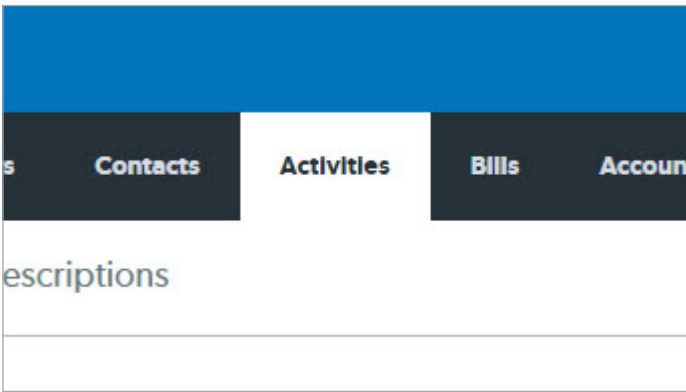
Billed Time	Service Allocation	Billed Time Collected	Billed Time Outstanding
\$204.00	47.55%	\$204.00	\$0.00
\$120.00	100.0%	\$120.00	\$0.00
\$275.00	85.94%	\$0.00	\$275.00
\$12.00	3.11%	\$0.00	\$0.00
\$72.00	6.33%	\$0.00	\$72.00
\$683.00		\$324.00	\$347.00

More details can be read in the [Fee Allocation Report Support Article](#).

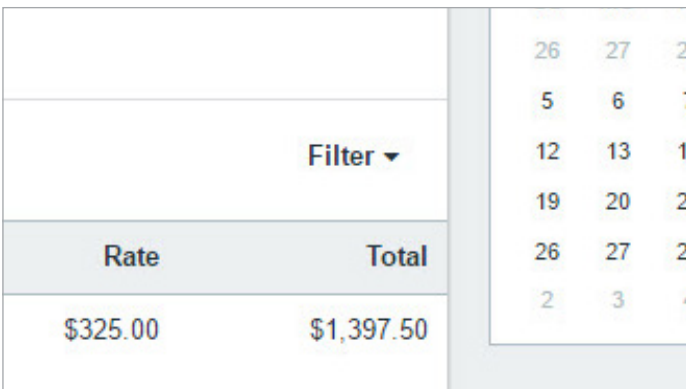
Supporting Data Driven Decisions

Go beyond the advanced reporting tools to create your own reports on individual Time Entries. Use this data in conjunction with the reports to make data driven decisions regarding productivity in your firm.

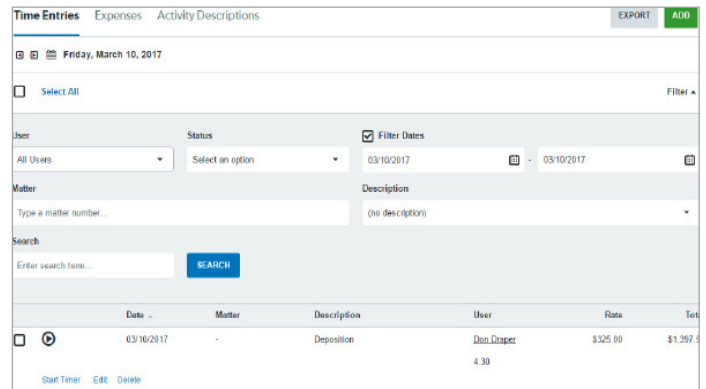
1. Select Activities at the top of Clio.



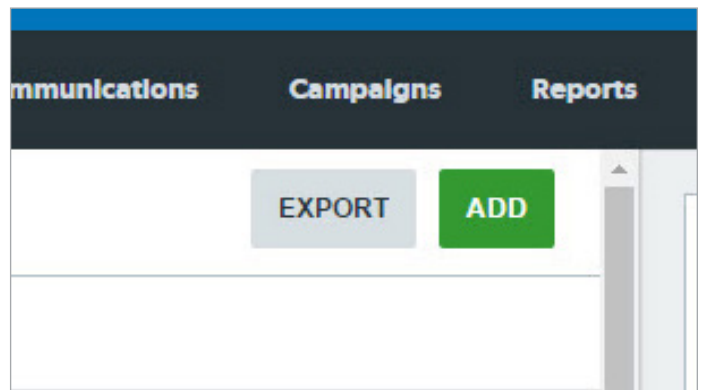
2. From Activities, select Filter on the right hand side.



3. From the Filter options, select All Users, and then choose your desired Date Range.



4. At the upper right, select the Export button to create a CSV file (Excel compatible) that includes all Time Entries. Use this data in conjunction with your Reports to make informed decisions.



More details can be read in the [Time Entries Support Article](#).

Further Training:

Clio Product Pro

A guided learning Experience

After our Webinar, our users should feel more comfortable using our standard tools. For a more in-depth training experience, give Clio Product Pro a try!

Clio Product Pro Certification provides the opportunity to learn the ins and outs of Clio through a self-paced, guided learning experience. You'll start things off with an understanding of what it really means to work "in the cloud" and how to do so ethically and securely. Then, we'll explore all of our features and functions to ensure that you are absolutely comfortable managing your practice in Clio.

Sign up today at clio.com/clio-product-pro

