GROWTH SUITE
CONSULTING

CLIO CERTIFIED CONSULTANT
For Law Firms

Operations and AI help for small law firms, from a COO who has run one.

Small firms lose hours to work that has nothing to do with practicing law: intake follow-ups, engagement letters rebuilt by hand, documents assembled field by field, and tools that don't talk to each other. Growth Suite fixes those workflows inside the systems your firm already uses, starting with Clio.

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Where firms usually lose time

- **Intake.** Staff chase prospective clients to fill out forms and book consults.
- **Engagement letters.** Templates exist, but fees and scope get edited by hand every time.
- **Document assembly.** Information is entered once, then retyped into the forms that need it.
- **Disconnected tools.** Clio, email, scheduling, and document storage each hold part of the picture.
- **AI with no guardrails.** Staff are trying AI tools, and nobody has written down what's allowed with client information.

What Growth Suite does in Clio

- Configures intake, engagement, and matter workflows in Clio Grow and Clio Manage.
- Builds templates and document automation so information is entered once.
- Connects Clio to the email, calendar, and document storage your firm uses.
- Trains your staff, and writes procedures they can follow.

INVESTMENT

Start with a project

Each one is fixed price, with a defined deliverable and end date. Ongoing Fractional COO support for firms is $3,000 per month.

Projects that fit firms

- **AI Readiness Assessment, $2,500.** Includes an AI acceptable use policy written with confidentiality in mind. Your attorneys make the final call on professional responsibility questions.
- **Tech Stack & Vendor Spend Audit, $2,500.** Every subscription the firm pays for, mapped and checked for overlap with Clio.
- **Process & Automation Project, from $4,500.** One workflow, such as intake, engagement letters, or deed recording, rebuilt end to end.

Good to know

Growth Suite provides operational and technology services. Nothing here is legal advice, and your firm keeps responsibility for its ethics and professional conduct obligations.

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