



## #GoneClio: Rosengren Kohlmeyer

Meet Jason Kohlmeyer, a founding partner of the Rosengren Kohlmeyer Law Office, based in the region hub of Mankato, Minnesota.

### What Prompted You to Start Your Own Firm?

I've been a lawyer for 11 years, and Chris Rosengren has been a lawyer for 13 years. We both worked in large firms before opening up our own. We realized we could do it ourselves, so we started our firm in September of 2008 and from day one, we've been talking about efficiency. You get efficient by trimming overhead.

We focus on three things:

1. Plaintiffs Worker Compensation
2. Criminal Defense
3. Family Law



### How many people work in your firm?

We have three lawyers and four staffers.

### Did you incorporate?

Yes. We're an S-Corporation.



## **Did you use anything before Clio?**

Yes. The old firm used Amicus. They had Time Matters for about 6 months, but no one could figure it out so they shifted to Amicus. It was kind of cool, and they used it from '02-'09. When I started Kohlmeyer Rosengren, we dropped \$6000 on Amicus for the accounting side. It was OK but after the first year we got hit with a service contract, about \$2000, which was pretty steep.

We looked at Clio and Rocket Matter seriously. I didn't like the every month concept, but we broke down the service plan (we were always calling for service with Amicus), and with no extra costs for upgrades or support, we saw it was more economical.

And the transition to Clio was insanely easy. We'd only been around for a year, so we didn't have a whole lot of information, but they exported the stuff from Amicus and imported the stuff to Clio. It took a little time but it was pretty darn seamless. Never crashed. Internet 99% up, so we can be working from home, too. It's just fantastic.

## **What made you decide on Clio? Did you try out any other solutions?**

I called up Rocket Matter initially. I thought their website was too basic, and I wanted to know what I'm signing up for. Their big pitch was "sign up and you'll figure it out" and I didn't like that. I do like not having to pay the same price for staffers though. Clio saves up front with low cost. Anyway, the big thing was Outlook integration. Rocket Matter didn't do that at the time.

## **What problems did Clio help your firm solve?**

Number one thing in terms of immediacy was billing. Every year I teach a class on how to get paid in tough economic times (like the last 4 years). Clio lets us look at what we're billing in a day and what we're collecting instead of just showing hours. We're big on branding so having our logo on our bills was a big deal. Couldn't do that with Amicus.

Oh, and having client contact information, and being able to integrate email made Clio so much easier than Amicus. And the speed! Amicus, even though we had a server, every click took forever. Four seconds from Matter to phone number. Clio is faster. I can click on the Notes while talking to a client, and they pop right up so I can see they have 3 kids, and I can ask about them while talking to the client. It sounds like I know them.



### **What did you find to be Clio's most valuable feature?**

Ease of access to the data in the cloud. Absolutely the best feature of Clio. Sitting at home, might wonder "what time is the hearing?" and can just hop on my iPad and check. Or I just remember a task, and I can whip out my phone and add it while sitting in the local drive-thru.

Search is pretty darn quick, too. Amicus was just painful. I couldn't do good conflict checks. With Clio, someone calls, quick search and boom, there's their name and information.

### **What benefits have you realized from Clio that you didn't anticipate?**

Backup. We do have a server for on site storage of backup hard drive. But if the firm burns down tomorrow, all we need to do is go down to Best Buy, buy some laptops and we'll be good to go. All the billing is there, and all client contact information is there.

### **Have Clio & "the Cloud" changed the way you practice law? If so, how?**

Yes. Looking back, pre-Clio and post-Clio, Clio has been the catalyst that said this is prime time, the way of the future. So as long as we have an Internet connection, we can really do almost anything in the cloud. We use Dropbox and Evernote to help go paperless. If we're sitting in any courtroom with wifi or 3G, we can do a quick search in Clio and find what we need.

Also, we never really tracked what our staffers did in terms of time/billables, either. Now, we run a report in Clio every Monday and we can see what they've been doing. If they're not reaching hours, we have a chat with them and see if they're billing for everything. Doing that has probably paid for 5 years of Clio.

### **How did you find the process of getting up and running with Clio?**

Pretty darn good. Bulk of it was so self explanatory. Here's the name, type it in. Watch the videos. That's one of the things that made us happy with Clio. With Amicus, we bought all the training materials and it sucked. Drop a few grand on a product, and then drop more for training that isn't very good. With Clio, you just watch a 3 minute video and you know how to do something.



## **How has Clio improved your firm and the service you offer your clients?**

We never really hopped on Clio Connect, we just don't do that. But we do email the bill directly, which helps on paperless side quite a bit. Just the constant "we know what we're talking about," that a client has 3 kids not 2 kids. Knowing how many kids are involved in a case makes you look smarter. Five or ten cases, easy to remember those things. If you have 40 cases, though, you don't remember everything.

We populate the Notes feature. Time we put on the bill for the client, but the Notes are in house. We do so much email so we'll cut and paste something important into the Notes. Clio helps us stay on top of the files better so they don't get as lost as they used to. The Notes provide a quick history, an update on the case. Easy to stay on top of a summary. Notes are really easiest way for small practitioners to stay on top of things.

## **Have you had any experiences with Clio's support team?**

Yes. I know my staff emailed 25 times but we always got an answer back, either a phone call or an email. I never felt like we were being upsold too, either. Clio Support is always pleasant, and easy to talk to.

As an example, we had a weird glitch. A trust account was \$4.18 off, I had some time so went at it to try and figure it out. I emailed Clio Support, and got a standard type of response. And then, a couple hours later, I got an answer that they were working on it, escalating it. It was like they cared. They called back, and it was nice. The problem got resolved.

I never remember being happy when getting off the phone with Amicus support.

## **Would you recommend Clio to your colleagues?**

Absolutely, though not to my competitors. I want them to be inefficient. All my buddies that aren't competitors, though, you bet. Anyone outside the market, I'm pushing Clio all the time. I'm constantly a Clio cheerleader.

The hardest sell is those who use Outlook. If they haven't bought into the practice management idea, it's a tough sell as they don't really get it. Rocket Matter is a little wittier, though, in their advertising. Clio could work on that.



Practice Management Simplified

## **Mac or PC?**

PC, though partner has iPhone and we use iPads. Still PC. It's just what we know. We started super cheap, went to a Dell outlet and got a PC-based server for the printer. We knew the PC system already, and it's cheap and reliable. But now, it matters less since we're in the cloud.

## **Final thoughts?**

We really enjoy the product. And it was cool to email suggestions and then see some of those suggestions implemented. We made a bunch of suggestions to Clio, and they always followed up. Sent suggestion once about documents and got a great response on why they can't do documents, and what they're trying to do instead of just throwing the suggestion away. It was neat that they responded like that.

You almost feel like you have a stake in the company. Almost like a buy in, you get that emotional buy in. Whenever Clio releases a new feature, it's kind of a big day at the office. We get excited. The pictures feature, we had fun with that. We put actual staff pictures, which was kind of neat.

All and in all we love the product, the company and dealing with you guys. Be a little wittier in the advertising, though (wink).