The No-Panic Clio Migration Playbook

A practical checklist for moving your firm's data, workflows, and people without losing track of what matters.

Your cases will not pause while your software changes. This playbook helps make sure the firm does not pause either.

How to use this playbook

Migration gets much less intimidating when every decision has an owner and every milestone has a date.

Use this playbook to track the project from initial planning through data migration, validation, customization, staff training, and the first month after launch.

For each task:

☐ **Check it off** when completed.
Owner: Name/initials the person responsible.
Due Date: Give the task a real deadline.
Evidence / Sign-off: Record how you know it was completed.

A checked box without an owner is mostly optimistic typography.

Project Information

Project Information	Details
Firm	
Current Practice Management System	
Clio Migration Specialist	
Clio Consultant	
Firm Migration Lead	
Executive Sponsor	
Finance / Accounting Lead	
Final Export Date	
Old System Cut-Off Time	
Target Go-Live Date	
Migration Review Deadline	

PHASE 1

Put Someone in Charge

Software does not migrate law firms. People do.

Before discussing custom fields, workflows, or clever automations, establish who is responsible for making decisions.

Item	Owner	Due Date	Evidence / Sign-off
☐ Appoint an executive sponsor who can approve major decisions, timing, and budget.			
☐ Appoint one migration lead responsible for coordinating the project.			
☐ Identify the person responsible for billing and financial reconciliation.			
☐ Identify the person responsible for trust-account information.			
☐ Identify an administrative or technical lead for users, permissions, devices, and integrations.			
☐ Select an internal champion for each major practice area.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Identify who has authority to approve the migrated data.			
☐ Put the Clio migration specialist and the firm's Clio consultant in direct contact.			
☐ Create one migration decision log.			
☐ Create one migration issue log.			
☐ Establish one place for migration communications and documents.			

Define what "done" means

Item	Owner	Due Date	Evidence / Sign-off
☐ All active matters are accounted for.			
☐ Critical future court dates and deadlines have been independently verified.			
☐ Contact and matter data appear in the intended fields.			
☐ Accounts receivable has been reconciled or differences documented.			
☐ Trust balances have been reconciled or differences documented.			
☐ Every user can log in and perform the functions required for their role.			
☐ All transition-period time and expenses have been reassigned.			
☐ Historical information that will not live in Clio has a documented home.			

PHASE 2

Inventory What You Actually Have

Before asking, "Can Clio migrate our data?" determine what **our data** actually means.

Law firms have a remarkable ability to discover mission-critical spreadsheets approximately six minutes before a software migration.

Systems inventory

Item	Owner	Due Date	Evidence / Sign-off
☐ Identify the current practice management system.			
☐ Identify the accounting system.			
☐ Identify document storage systems and locations.			
☐ Identify email systems.			
☐ Identify calendar systems and shared calendars.			
☐ Identify intake and CRM systems.			
☐ Identify payment-processing tools.			
☐ Identify e-signature tools.			
☐ Identify document-automation tools.			
☐ Identify phone and texting integrations.			
☐ Identify court-calendaring or docketing tools.			
☐ Locate spreadsheets and databases containing operational or client information.			
☐ Identify information kept on local computers or personal calendars.			

Data inventory

Item	Owner	Due Date	Evidence / Sign-off
☐ Contacts			
☐ Companies			
☐ Matters			
☐ Related contacts			
☐ Notes			
☐ Tasks			
☐ Calendar events			
☐ Emails and communications			
☐ Time entries			
☐ Expenses			
☐ Accounts receivable			
☐ Trust balances and trust history			
☐ Historical invoices			
☐ Payments and credits			

Item	Owner	Due Date	Evidence / Sign-off
☐ Documents			
☐ Custom fields			
☐ Practice areas			
☐ Billing rates			
☐ User accounts and permissions			
☐ Historical reports required for retention			

PHASE 3

Determine What Is Moving and What Is Staying Behind

Do not accept **"the data will migrate"** as the project specification.

Different categories of information may be imported differently, summarized, excluded, or require another migration method.

Item	Owner	Due Date	Evidence / Sign-off
☐ Obtain the migration scope in writing.			
☐ Confirm whether open matters will migrate.			
☐ Confirm whether closed matters will migrate.			
☐ Confirm how former users and timekeepers will be represented.			
☐ Confirm how accounts receivable will be represented.			
☐ Confirm how trust balances will be represented.			
☐ Confirm how unbilled time will be handled.			
☐ Confirm how unbilled expenses will be handled.			
☐ Confirm whether documents are included.			
☐ Confirm whether email records and attachments are included.			
☐ Confirm how custom fields will be mapped.			
☐ Confirm whether existing matter numbers will be retained.			
☐ Confirm how duplicate contacts will be handled.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Confirm what accounting history will not migrate.			
☐ Confirm what invoice history will not migrate.			
☐ Confirm what settings and permissions must be rebuilt.			
☐ Confirm whether a sample or test migration is available.			
☐ Determine how long the old system should remain accessible.			
☐ Establish where non-migrated historical records will be retained.			

PHASE 4

Clean Before You Pack

Migration is a very expensive way to discover that your database contains six versions of the same client's name.

Clean known problems before the final export.

Item	Owner	Due Date	Evidence / Sign-off
☐ Review duplicate contacts.			
☐ Correct names entered into the wrong fields.			
☐ Check company contacts for proper company names.			
☐ Confirm every active matter has an associated client.			
☐ Standardize matter statuses.			
☐ Standardize practice-area names.			
☐ Verify that matter numbers are unique.			
☐ Review obsolete custom fields.			
☐ Review duplicate custom fields.			
☐ Check tasks assigned to former employees.			
☐ Check time entries assigned to former or invalid users.			
☐ Review calendar events for date and time problems.			
☐ Verify applicable time zones.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Check open matters for missing responsible attorneys.			
☐ Document intentional exceptions rather than changing historically accurate data.			

PHASE 5

Get the Money Right

Financial history deserves its own migration plan.

Do not wait until after go-live to discover which historical reports the bookkeeper expected to keep forever.

Item	Owner	Due Date	Evidence / Sign-off
☐ Coordinate the migration timeline with the firm's accountant or bookkeeper.			
☐ Determine the final billing cutoff.			
☐ Generate approved outstanding bills before extraction where appropriate.			
☐ Apply appropriate credits.			
☐ Apply appropriate trust payments.			
☐ Reconcile accounts receivable.			
☐ Reconcile trust accounts.			
☐ Export historical invoices.			
☐ Export accounts receivable reports.			
☐ Export trust ledgers and trust reports.			
☐ Export operating-account reports required for retention.			
☐ Export WIP and unbilled-activity reports.			
☐ Record baseline financial totals for post-migration comparison.			
☐ Determine how historical financial information will remain accessible.			

PHASE 6

Create the Clio Blueprint

Design before building.

Otherwise, customization can become the software equivalent of renovating the kitchen while the moving truck is still unloading boxes.

Firm-wide design

Item	Owner	Due Date	Evidence / Sign-off
☐ Define practice areas.			
☐ Define matter-numbering rules.			
☐ Define matter statuses.			
☐ Define responsible-attorney conventions.			
☐ Define originating-attorney conventions.			
☐ Define user roles and permissions.			
☐ Define activity categories.			
☐ Define billing rates and rate hierarchies.			
☐ Define invoice settings.			
☐ Define trust and operating-account requirements.			
☐ Define folder structures.			
☐ Define file-naming conventions.			
☐ Identify integrations required at launch.			
☐ Identify integrations that can wait until later.			

First practice-area blueprint

Item	Owner	Due Date	Evidence / Sign-off
☐ Select the practice area that will create the greatest operational benefit.			
☐ Define matter stages.			
☐ Define tasks required at each stage.			
☐ Assign task responsibilities.			
☐ Define contact custom fields.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Define matter custom fields.			
☐ Define picklist values.			
☐ Identify document templates.			
☐ Define folder structure.			
☐ Define calendar procedures.			
☐ Define intake requirements.			
☐ Define closing procedures.			
☐ Identify automated workflows.			
☐ Define reporting requirements.			

PHASE 7

Choose the Switch-Over Date

Pick a date when the firm can tolerate some operational friction.

That generally excludes the managing partner's trial week, month-end billing, major filing deadlines, and Friday afternoon adventures.

Item	Owner	Due Date	Evidence / Sign-off
☐ Obtain the current migration-processing estimate from Clio.			
☐ Choose a low-risk operational period.			
☐ Check the litigation and court calendar.			
☐ Check limitation and filing deadlines.			
☐ Check billing deadlines.			
☐ Check trust reconciliation dates.			
☐ Account for holidays and staff vacations.			
☐ Build contingency time into the schedule.			
☐ Establish the final cleanup deadline.			
☐ Establish the training dates.			
☐ Establish the exact export date.			
☐ Establish the exact old-system cutoff time.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Establish the imported-data review period.			
☐ Establish the proposed integration activation date.			
☐ Establish the first post-launch review date.			

PHASE 8

Communicate the Cutover

Nobody should learn that the old system has been frozen because an error message tells them so.

Item	Owner	Due Date	Evidence / Sign-off
☐ Announce the cut-off date to the firm.			
☐ Repeat the announcement before the cut-off.			
☐ Explain exactly when users must stop entering information in the old system.			
☐ Explain where time will be recorded during the transition.			
☐ Explain where expenses will be recorded.			
☐ Explain how new matters will be handled.			
☐ Explain how new contacts will be handled.			
☐ Explain how urgent deadlines will be handled.			
☐ Explain how documents and notes will be handled.			
☐ Identify the migration support channel.			
☐ Tell users not to activate calendar, contact, or other integrations independently.			
☐ Determine whether any client-facing changes require communication.			

PHASE 9

Final Export and Freeze

The freeze rule

The old system is now wet paint. Do not touch it, lean on it, or make "one tiny update."

Item	Owner	Due Date	Evidence / Sign-off
☐ Create a final backup.			
☐ Record the exact export date and time.			
☐ Record who performed the export.			
☐ Preserve unmodified copies of the export files.			
☐ Record file names and file sizes.			
☐ Verify that every expected export file exists.			
☐ Open samples to verify the files are readable.			
☐ Check representative first and last records.			
☐ Record the final number of contacts.			
☐ Record the final number of matters.			
☐ Record the final number of tasks.			
☐ Record the final number of calendar events.			
☐ Record financial baseline totals.			
☐ Put the old system into read-only mode where possible.			
☐ Post a prominent notice that the old system has been frozen.			

PHASE 10

Survive the Awkward Middle

The firm still has clients while the data is being migrated.

This is where the temporary-matter procedure earns its keep.

Temporary matters

Item	Owner	Due Date	Evidence / Sign-off
☐ Decide whether to use one firm-wide temporary matter or one per timekeeper.			
☐ Create the temporary matters.			
☐ Establish a consistent naming convention.			
☐ Restrict who may create additional temporary matters.			
☐ Establish a mandatory time-entry description format.			

Required description format

Old Matter Number | Client Name | Work Performed

Example:

2024-1187 | Garcia | Drafted response to discovery requests

Transition controls

Item	Owner	Due Date	Evidence / Sign-off
☐ Require daily time entry.			
☐ Require the old matter number in every time-entry description.			
☐ Require the client name in every time-entry description.			
☐ Create a procedure for expenses and receipts.			
☐ Maintain a transition log for new contacts.			
☐ Maintain a transition log for new matters.			
☐ Maintain a transition log for urgent calendar events.			
☐ Maintain a transition log for notes and status changes.			
☐ Establish a conflicts-check procedure for new matters.			
☐ Establish a procedure for documents created during the transition.			
☐ Establish a procedure for emails created during the transition.			
☐ Assign someone to review the transition log daily.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Keep integrations disabled.			
☐ Record every item that will require manual reconciliation.			

PHASE 11

Validate the Migration

Imported does not automatically mean correct.

Treat the data like evidence: verify it before relying on it.

Important

Do not begin broadly correcting imported records until the migration team has confirmed that the import has been accepted or that corrections can safely begin.

Record counts

Item	Owner	Due Date	Evidence / Sign-off
☐ Compare contact counts.			
☐ Compare open matter counts.			
☐ Compare closed matter counts.			
☐ Compare task counts.			
☐ Compare calendar-event counts.			
☐ Compare note counts.			
☐ Compare unbilled-time totals.			
☐ Compare accounts receivable totals.			
☐ Compare trust balances.			
☐ Document every material discrepancy.			

Contact spot checks

Item	Owner	Due Date	Evidence / Sign-off
☐ Verify first and last names.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Verify company names.			
☐ Verify email addresses.			
☐ Verify phone numbers.			
☐ Verify mailing addresses.			
☐ Verify custom fields.			
☐ Verify related contacts.			
☐ Verify notes.			

Matter spot checks

Item	Owner	Due Date	Evidence / Sign-off
☐ Verify the client assignment.			
☐ Verify the matter number.			
☐ Verify the matter description.			
☐ Verify the status.			
☐ Verify the practice area.			
☐ Verify the responsible attorney.			
☐ Verify the originating attorney.			
☐ Verify custom fields.			
☐ Verify related contacts.			
☐ Verify notes.			
☐ Verify tasks.			
☐ Verify calendar events.			
☐ Verify activities.			
☐ Verify documents where included.			

PHASE 12

Give the Calendar Extra Attention

A misspelled phone number is annoying.

A missing filing deadline is something else entirely.

Item	Owner	Due Date	Evidence / Sign-off
☐ Export or print the calendar from the old system.			
☐ Export or report the corresponding calendar from Clio.			
☐ Compare past events using representative samples.			
☐ Compare all critical future events.			
☐ Verify court dates.			
☐ Verify filing deadlines.			
☐ Verify limitation dates.			
☐ Verify hearing dates.			
☐ Verify dates and times.			
☐ Verify time zones.			
☐ Verify responsible users.			
☐ Verify matter associations.			
☐ Verify recurring appointments.			
☐ Verify reminders where applicable.			
☐ Have a human verify every critical future deadline.			

An approved AI tool can be useful for comparing reports and identifying inconsistencies. It should be the second set of eyes, not the person ultimately responsible for a court deadline.

PHASE 13

Make the Go / No-Go Decision

Do not approve full launch if you have:

☐ A missing active matter
☐ A discrepancy involving a critical court or limitation deadline
☐ An unexplained trust balance
☐ A material unexplained accounts receivable difference
☐ Incorrect access to confidential matters
☐ No reliable way to record time
☐ Missing or unreadable backups

Go-live approval

Item	Owner	Due Date	Evidence / Sign-off
☐ Migration scope has been completed.			
☐ All active matters have been accounted for.			
☐ Critical future deadlines have been verified.			
☐ Accounts receivable has been reconciled or exceptions approved.			
☐ Trust balances have been reconciled or exceptions approved.			
☐ Every user can log in.			
☐ Permissions have been tested.			
☐ The firm has a reliable method for recording time and expenses.			
☐ Material migration issues have been resolved.			
☐ The migration lead has signed off.			
☐ The finance lead has signed off.			
☐ Launch-week support is ready.			

PHASE 14

Reconcile the Transition Period

Temporary means temporary.

Do not allow the migration holding matters to become permanent residents.

Item	Owner	Due Date	Evidence / Sign-off
☐ Move temporary time entries to the correct matters.			
☐ Move expenses to the correct matters.			
☐ Attach or relocate expense receipts.			
☐ Create or complete matters opened during the transition.			
☐ Add new contacts.			
☐ Add notes and status changes.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Add and verify calendar events.			
☐ File documents in the correct matters.			
☐ File applicable emails in the correct matters.			
☐ Compare transition-period time totals by user and date.			
☐ Compare transition-period expense totals.			
☐ Clear every transition-log item.			
☐ Verify temporary matters contain no remaining activity.			
☐ Close temporary matters.			

PHASE 15

Customize Clio Manage

Start with the practice area that can create the greatest benefit.

Do not try to automate the entire firm before anyone knows where the time-entry button lives.

Recommended build sequence

Item	Owner	Due Date	Evidence / Sign-off
☐ Configure user accounts and permissions.			
☐ Configure practice areas.			
☐ Configure matter numbering.			
☐ Configure billing rates.			
☐ Configure activity categories.			
☐ Configure custom fields.			
☐ Configure matter stages.			
☐ Configure task lists.			
☐ Configure document templates.			
☐ Configure folder structures.			
☐ Configure automated workflows.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Configure approved integrations.			

Pilot one practice area

Item	Owner	Due Date	Evidence / Sign-off
☐ Create a test matter.			
☐ Test intake and matter opening.			
☐ Test task assignments.			
☐ Test matter stages.			
☐ Test calendar procedures.			
☐ Test document generation.			
☐ Test time entry.			
☐ Test expenses.			
☐ Test billing.			
☐ Test matter closing.			
☐ Record improvements before expanding to another practice area.			

PHASE 16

Configure Clio Grow

Build Manage first so the firm can intentionally decide what information should flow from intake into the working matter.

Item	Owner	Due Date	Evidence / Sign-off
☐ Define intake stages.			
☐ Define lead-source tracking.			
☐ Configure intake forms.			
☐ Configure appointment scheduling.			
☐ Configure email templates.			
☐ Configure consultation workflows.			
☐ Synchronize supported field definitions.			
☐ Test creation of contacts.			

Item	Owner	Due Date	Evidence / Sign-off
☐ Test creation of matters.			
☐ Test conversion from Grow to Manage.			
☐ Confirm required data survives conversion.			
☐ Check for duplicate contacts.			
☐ Test associated templates and workflows.			
☐ Document information requiring manual updates.			

PHASE 17

Train Humans, Not User Accounts

Giving someone a login does not constitute training.

Let each person perform the clicks required for their job.

Item	Owner	Due Date	Evidence / Sign-off
☐ Train administrators.			
☐ Train attorneys and other timekeepers.			
☐ Train paralegals and support staff.			
☐ Train the billing team.			
☐ Practice finding a matter.			
☐ Practice entering time.			
☐ Practice entering expenses.			
☐ Practice finding documents.			
☐ Practice using tasks.			
☐ Practice using the calendar.			
☐ Practice generating a document.			
☐ Practice updating matter stages.			
☐ Practice generating bills where appropriate.			
☐ Provide one-page job aids.			
☐ Record short firm-specific demonstrations.			
☐ Identify internal Clio champions.			
☐ Establish one support channel.			

Training rule: When someone gets stuck, show them where to click and let them complete the task. Taking over the mouse solves today's problem. Helping them perform the task helps build tomorrow's habit.

PHASE 18

The First 30 Days

Expect Clio to feel unfamiliar before it feels normal.

The objective during the first month is not perfection. It is consistent use.

Week 1: Stabilize

Item	Owner	Due Date	Evidence / Sign-off
☐ Resolve login and access issues.			
☐ Review daily time entry.			
☐ Resolve critical workflow problems.			
☐ Hold short support office hours.			

Week 2: Reinforce

Item	Owner	Due Date	Evidence / Sign-off
☐ Review task usage.			
☐ Review matter-opening consistency.			
☐ Review calendar procedures.			
☐ Identify users who need additional help.			

Week 3: Improve

Item	Owner	Due Date	Evidence / Sign-off
☐ Identify duplicate work.			
☐ Improve document templates.			
☐ Improve custom fields.			
☐ Review integration performance.			

Week 4: Standardize

Item	Owner	Due Date	Evidence / Sign-off
☐ Document approved firm procedures.			
☐ Update job aids.			
☐ Retire temporary workarounds.			
☐ Select the next practice area to optimize.			
☐ Hold the first monthly Clio brown-bag meeting.			

PHASE 19

Make the Brown-Bag Lunch Useful

Lunch is optional. Improving the process is the point.

Monthly Clio Meeting

Date: ________________________
Facilitator: ________________________

Discussion	Notes / Decision	Owner	Due Date
What recurring task is taking too long?			
What process could be standardized?			
Is there a document that should become a template?			
Is there a custom field the firm should add or retire?			
Is a date being tracked manually that could be handled better?			
Has anyone discovered a faster way to perform a recurring task?			
Is there a new Clio feature worth testing?			
What is the one improvement we will implement this month?			

PHASE 20

Close the Old System Responsibly

Do not cancel the old software merely because everyone is tired of looking at the invoice.

Item	Owner	Due Date	Evidence / Sign-off
☐ Obtain written acceptance of the migrated data.			
☐ Confirm transition-period reconciliation is complete.			
☐ Confirm historical invoices have been preserved.			
☐ Confirm required financial reports have been preserved.			
☐ Confirm trust records satisfy applicable retention requirements.			
☐ Confirm backups are readable.			
☐ Document how historical information can be retrieved.			
☐ Remove unnecessary access to migration files.			
☐ Securely delete temporary exports when appropriate.			
☐ Obtain approval before canceling the old system.			
☐ Record the old-system cancellation date.			
☐ Conduct a 30-day project review.			
☐ Record lessons learned.			

Migration Issue Log

 # Date Issue Risk Owner Resolution / Status

Final Sign-Off

Approval	Name	Signature / Initials	Date
Migration Lead			
Finance / Accounting Lead			
Practice Administrator			
Executive Sponsor			
Clio Consultant, if applicable			

Final question

Can the firm work confidently in Clio tomorrow without relying on memory, unofficial spreadsheets, or information trapped in the old system?

☐ Yes
☐ Not yet

If the answer is **Not yet**, congratulations: you found something while there is still time to fix it.

Disclaimer

This playbook provides general operational guidance based on implementation experience and published Clio migration practices. Migration scope, timing, available migration services, software functionality, financial treatment, information-security requirements, trust-account obligations, and record-retention requirements should be confirmed for the particular firm with Clio, the firm's consultant, accounting professionals, and other appropriate advisers.
