

Architect's Foreword

Migrating to a cloud-native Practice Management System (PMS) like Clio is often over-engineered, resulting in "analysis paralysis" and delayed ROI. This kit provides a compressed, high-velocity blueprint to achieve operational capability in 30 days. The focus is on **Minimum Viable Data (MVD)**—transferring active matters and financial integrity first, then archiving the rest.

EXECUTION TIMELINE

W01

DATA

Hygiene & Extraction

Legacy data is rarely clean. We extract all data immediately to identify corruption early.

- Export Contacts, Matters, and WIP to CSV/Excel.
- Normalise 'Matter Status' fields (e.g., map "Open" and "Active" to Clio's "Open").
- **Critical:** Identify unbilled time/disbursements and balance client ledgers.

W02

CONFIG

Architecture & Settings

Configure the destination before the data arrives. Avoid "default" settings.

- Set up **Clio Payments** (takes 2-3 days for KYC approval).
- Map Custom Fields (e.g., "Court Reference", "Opposing Counsel").
- Configure Billing Templates to match firm branding standards.
- Integrate Xero/QuickBooks and Office 365/Google Workspace.

W03

PILOT

Validation & Training

Do not train everyone yet. Train the "Champions" only using real firm data.

- Import the "Gold Set" (10% of matters with highest complexity).
- Run a full billing cycle simulation on the Gold Set.
- **Clio Duo Check:** Ensure AI permissions are set correctly for privacy.

W04

LIVE

Cutover & Delta

The final switch. Requires a strict "Pencils Down" order on the legacy system.

- Friday 5 PM: Revoke "Write" access to legacy PMS.
- Saturday: Perform "Delta" migration (data changed since W1).
- Sunday: Validate Financial Balances (Trust/Client Account).
- Monday 9 AM: All users log into Clio. Legacy system is read-only.

Retention Assets

COMMUNICATION

The "Why" Memo

A pre-written email from the Managing Partner to the firm to preempt resistance.

"We are not just changing software; we are upgrading our ability to serve clients. The new system allows us to bill on mobile, automate intake, and securing our data..."

TECHNICAL

Field Mapping Matrix

Excel template to align legacy fields with Clio schema.

Legacy Field	Clio Field	Action
Client_Ref	Matter Number	Direct Map
Resp_Atty	Originating	Transform

MITIGATING COMMON OBJECTIONS

• "30 days is too fast. We need 6 months."

Parkinson's Law applies: work expands to fill the time available. Extended migrations lead to "scope creep" and data staleness. A short timeline forces prioritisation of active matters.

• "What about our historical emails?"

Do not migrate 10 years of emails into Clio. It clutters the search index. Archive them in a searchable, low-cost cold storage or leave them in the legacy backup, accessible if needed.

Expedited Clio Migration

30-DAY EXECUTION STRATEGY // PROTOCOL V2.6



EVALUATED BY

DATE

Alpodo Intelligence Layer // 2026.01.02