



Get Better: Client Growth and Automation with Clio Grow

Create email campaign

Send test

Send email

Email Content

Subject

Greeting

Hi [First Name],

Contact name


Client first name 

Body

B I U 

 Draft email

Hi [First Name],

We hope your experience with Waverly Law has been exceptional. As a valued client, we want to remind you of the importance of keeping your wills and 

 Drafted by AI

Insert email

Congratulations on completing your Clio Grow training session!

This session covered the core features in Clio Grow, including custom fields, intake checklists, automated workflows, and email marketing.

Your next steps are to practice these action items in your Clio account.

Sync your [Clio Manage Custom Fields to Clio Grow](#)

Create a [question on a form](#)

Edit an [automated workflow template](#)

Use AI to [create an initial email copy](#)





Take some time to complete the tasks listed above, and use the links embedded to help you through each task if needed.

As always, if you have any questions, please reach out to our Support team by speaking to our AI Support agent, by phone: 1-888-858-2546 or email at support@clio.com.

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