

DMH Stallard embeds new ways of working with Clio Operate

"Harbor worked seamlessly alongside our internal trainer and project team to quickly get to grips with Clio Operate and our specific configuration. The sessions were clear and practical, and the Quick Reference Guides have been a real asset for our teams as they embed new ways of working."

Richard Hill, Operations Director, DMH Stallard

When DMH Stallard implemented Clio Operate, formerly ShareDo, to enhance matter and file management, it needed to help people adopt new workflows and use the system confidently from day one.

The firm partnered with Harbor to deliver a practical, role-based training and support program across its teams and locations.

Mastering a new platform quickly

Working alongside DMH Stallard's internal trainer, Harbor quickly developed an in-depth understanding of the system, including the firm's customizations and integrations.

The program was designed around the firm's roles, workflows, and day-to-day requirements. Training was delivered through a combination of onsite and remote sessions, making it accessible to different teams and locations.

Reinforcing new workflows

The implementation required people to learn new workflows and understand how Clio Operate had been configured for DMH Stallard. Training focused on practical tasks including navigating matters, using search and list views, creating documents, managing participants, tracking key dates, and working with the iManage integration.

To support users after training, Harbor produced eight Quick Reference Guides covering:

Account setup and navigation

Search and filtering

Matter management

Participant and document handling

iManage integration

Key dates and team processes

Embedding change in daily work

The role-focused learning journey helped people understand how to use Clio Operate in their daily work. The Quick Reference Guides provided accessible point-of-need support, helping staff refresh their knowledge and complete common tasks independently.

The program gave DMH Stallard a practical, repeatable foundation for embedding new ways of working. It also demonstrated how internal collaboration, rapid platform expertise, and reusable support materials can help teams adopt a new matter-management platform with confidence.



“Based on this experience, we would **recommend Harbor** to other firms seeking **effective training** and **support** for new system rollouts, especially Clio Operate.”

Richard Hill, Operations Director, DMH Stallard



Harbor is a globally integrated team of strategists, technologists and specialists focused on helping law firms, corporations, and their law departments achieve breakthrough outcomes. We are also helping to steer a legal industry in the midst of turbulent change. We navigate alongside our clients and partners, providing salient insights, scalable resources, and seasoned advice.

This engagement was initiated by iTrain, which is now part of Harbor.



Established in Brighton in 1970, DMH Stallard is an award-winning, full-service law firm serving businesses, individuals, and families across the South East of England. The firm has offices in London, Brighton, Gatwick, Guildford, Hassocks, and Horsham and advises clients across a broad range of legal services.