

QUICKSTART COACHING OVERVIEW

Agenda

- Set up COA/Integrate QuickBooks
- Online Set Up LeanLaw
- High-level training
- Data Migration conversation (if needed)

Team

Tracie Cook
Onboarding Manager

Heather Mears
Late Stage Sales Facilitator

QUICKSTART CHECKLIST

Start your 14-day free trial to see how effortlessly LeanLaw integrates with your law firm operations. No credit card is required.

Sign up for a trial of LeanLaw [here](#).

LeanLaw is considered the best-in-breed software and is the highest-rated legal app in the QuickBooks Online app store.

Need a QuickBooks Online account? Get a **monthly discount** or an **annual discount** for the first year of your QuickBooks subscription.

LeanLaw can help you migrate data as part of your coaching session. We can help with the following:

- Client and matter import
- Work in progress import
- Conflict check data import

Data migration starts at \$250. If you need data import, please talk with your sales representative for a quote.

LeanLaw's electronic and automated payment system helps law firms collect more, collect faster, and collect at a lower cost.

If you would like a demo of Gravity Legal, you can sign up [here](#).

If you are ready to get started with LeanLaw Payments:

- Set up Gravity Legal in LeanLaw
- Create an email to send with the client's invoice

Ready to schedule your QuickStart Coaching session?

To schedule your QuickStart Coaching session, please contact your sales representative for an introduction.

NEED ADDITIONAL SUPPORT?

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