Three stages, one message: Clio's case for context in legal AI

Written by Alice Zhang

Across three of legal tech's biggest stages this year, Clio's message held steady: the firms getting a return on AI are the ones connecting it to the work itself, rather than bolting another interface onto an already crowded stack.

Clio put one claim in front of every room: the law, the matter, and a team's own standards belong in the same place. Context is what turns a capable model into capable work. Unlike a feature, context accumulates, so each matter leaves teams better equipped for the next one.

Legalweek: the system is a single pane of glass

In March 2026, Clio introduced Clio Operate to the North American market at Legalweek in New York City. Clio Operate gives mid-size and large law firms a single system for managing complex, multi-practice work across jurisdictions. Jack Newton, Clio's CEO and founder, described it as a single pane of glass across the firm: workflows, data, and performance visible in one place instead of scattered across disconnected systems.

LegalTechTalk: the defensible ground is the data and the record

By June in London, LegalTechTalk, Clio put a keynote in front of the main audience: John Saiz, NASA's former Chief Technologist, drawing organizational lessons from the space agency's failures for a profession facing its own reckoning with change. His point was uncomfortable and useful. Institutional failure is rarely a technology problem.

In the sessions that followed, Dan Hoadley, Clio's Senior Director of Product Management, joined a panel on legal AI's biggest threat and argued that the durable advantage for any legal AI vendor is proprietary data and ownership of the system where the work runs. Joanna Sidhu, Clio's Director of Legal Architecture, introduced Vincent by Clio to a room full of firms still weighing which AI investments will hold up over the next few years.

Both conversations pointed at the same conclusion. When every vendor can license the same models, the competition moves to the workflow layer.

ILTACON: Vincent inside the matter

Through it all, Clio's focus never moved: build what customers need. In August, we announced Vincent in Clio Operate. Vincent works from inside the system where large firms already run their matters, giving lawyers research, analysis, and drafting grounded in far more context than before. Vincent reads the structured record of the matter as it develops, including its facts, history, decisions, documents, workflows, and governing standards. It can review documents as they arrive, research the applicable law, support drafting, and route findings through configured workflows back into the matter record with lawyer confirmation. By bringing Vincent into Clio Operate, we are combining authoritative legal intelligence with the full context of the matter and the institutional knowledge of the organization.

This launch marked the next step in Clio's strategy to define the future of legal AI, moving the category beyond standalone tools and toward a new operating model for how complex legal work gets done. It is also the clearest evidence yet of the thesis Clio has been building toward since Legalweek: a legal AI product is only as useful as the context it can reach, and Clio holds all of it. The law, the matter, and the firm's own record of how it works.

Team Clio heads to Boston this October 26 and 27 for ClioCon, the next stop in that story. This year, we have a dedicated invite-only day for innovation leaders in Big Law**.** To learn more, visit cliocon.com.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.