

Introducing collaboration in Vincent

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With Projects, legal teams can now share documents and build on colleagues' work in one place.

Legal work is a team effort. Whether reviewing a colleague's findings or taking over an assignment, lawyers need to understand what's been done and have access to the information underpinning every matter. That includes the research and drafts produced in Vincent.

Projects brings a matter's documents and related conversations into one shared workspace. Colleagues can pick up where others left off without uploading the same files again or asking someone to send over their research.

For Thomas McGrath, product manager for Vincent at Clio, collaboration also means giving lawyers control over what they share.

“You have the ability to collaborate internally and decide who gets access to what,” he said. “So you remain entirely in control.”

Give the deal team the full picture

During an acquisition, lawyers divide the due diligence work across the team, bringing in specialists as questions come up. The partner overseeing the deal needs to see how those findings fit together and what it means for the client.

Connecting those elements was central to how Editha Nemsic, Development Manager, Forward Deployed Engineering at Clio, approached the feature.

“They’re going to split the work between them, but everything needs to come together to a finished deal,” she said.

With Projects, the team can create a Matter project for the acquisition, upload relevant documents and add background about the deal. Invited colleagues can use those files across Vincent workflows without uploading their own copies.

When an associate brings a specialist into the review, they can point them to the relevant conversation in the Project. The specialist can see what was asked and read Vincent’s response alongside the documents, then expand the research.

When more documents arrive or the client raises a follow-up question, the team can return to the earlier work and check it against the new information. The review history is there without having to dig through emails or track down the associate who started it.

Pick up a matter without starting over

An associate joining a litigation team can be stepping into a case that’s been running for months with a deadline approaching. Before starting on a motion, they need to get up to speed on the dispute and see how their colleagues’ original research relates to their assignment.

In a Matter project, the team can record the case summary and key facts, including the parties involved. The associate can read that background, then review related Vincent conversations and source documents in one place. Seeing the questions colleagues asked, not just the final draft, provides important context for the arguments they’re now being asked to develop.

Choose who sees what

Working for the same client doesn't mean every lawyer needs access to every matter. A firm handling both an acquisition and a lawsuit can keep the work in separate Projects, inviting the relationship partner to both and each legal team to its own.

Every member is invited and assigned a role, so creating a Project doesn't automatically expose its contents to everyone in the firm. Within each Project, an activity log records who did what and when, giving the partner a way to check progress before following up with colleagues.

Firm administrators also have visibility into Project membership and activity. That lets them review who has access across Projects, while each legal team manages its day-to-day work.

Manage ongoing work as a team

For in-house legal teams, employment compliance is an ongoing responsibility. HR has questions on policy updates or employee issues, and various lawyers can be called on to advise.

A General project gives counsel a shared record of employment policies and related Vincent conversations. A lawyer responding to HR's next question can refer to previous research and see which documents were used, and which colleague handled the original request.

Teams can choose the structure that suits the assignment. Matter projects include fields for case or transaction details, which the team enters manually. General projects offer a simpler setup for ongoing responsibilities that span individual matters.

Collaboration is just getting started

Projects is the start of a broader effort to make collaboration part of how lawyers use Vincent every day. We're developing new ways for teams to exchange information directly with clients and review documents with colleagues, with integrations that will bring more matter information into Vincent.

The ambition, says Nemsic, is to make Vincent “the one app you open every day.” For McGrath, collaboration connects the capabilities teams already use. “You’ve got the documents, we’ve got your matter context, we’ve got your legal context. All of that exists, and now you can collaborate.”

See how to get started with Projects in Vincent.

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.