# Meet Manage AI: Where Innovation Meets the Practice of Law

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What if, instead of working longer hours, you could boost efficiency by eliminating time spent on administrative tasks, document reviews, client management, and drafting messages? More efficiency means more time for revenue-generating work. Meet Manage AI, Clio's cutting-edge AI solution that's transforming the way lawyers work.

Powered by generative AI technology, Manage AI streamlines everything from case management to document reviews, helping firms operate at peak efficiency. No more drowning in paperwork or missing critical deadlines—this AI tool for lawyers takes care of repetitive tasks, giving you the freedom to focus on strategy, client relationships, and important casework.

As your productivity increases with Manage AI, so does your capacity to take on more clients and, ultimately, boost your firm's bottom line. This isn't just about working harder—it's about working smarter and becoming more profitable.

*Ready to dive in? See how Manage AI works within Clio Manage to extend your work without overextending you: Book your demo today.*

## How does Manage AI work?

Manage AI leverages your data inside of Clio's case management platform Clio Manage, to improve decision-making, efficiency, caseload visibility, communication, and compliance.

Unlike open-source AI tools like ChatGPT, which some lawyers try ChatGPT prompts for lawyers with to test ideas, Manage AI uses your firm's data to amplify your productivity from a single workspace. From managing court deadlines to turning information into insights, Manage AI does the heavy lifting so you can focus on the things that matter most.

## The rise of AI in the legal industry

The adoption of AI is only increasing–according to our latest *Legal Trends Report*, 79% of law firms are now using AI in some capacity, and one in four firms (24%) have already widely or fully integrated AI into their operations. Additionally, more than 80% of law firms expect to grow their AI usage in the next 12 months.

Beyond operational improvements, AI can help enhance client experience by boosting efficiency across your firm. Firm staff can focus on delivering a better client-centric experience, and grow their firms by devoting time and resources to marketing and attracting new clients.

In fact, clients are beginning to *prefer* that law firms use AI, with 70% of clients being either neutral or preferring that law firms use AI, with strong openness across generations: 81% of Gen Z, 75% of Millennials, 68% of Gen X, and 59% of Boomers are receptive to AI in legal services.

For lawyers, time is money, and with AI tools like Manage AI, they're reclaiming valuable hours and raising the bar for efficiency both within their firms and across the legal industry.

# Top benefits of using Manage AI

Curious how exactly Manage AI can amplify everything you do? This cutting-edge, AI-powered feature is packed with benefits. Here are the standout advantages:

## Never miss a deadline

Deadlines are non-negotiable in law, and managing them shouldn't mean combing through dense legal text or manually adding events to your calendar. With Manage AI, that work happens automatically.

Manage AI reads and interprets court documents to identify every relevant deadline, then instantly creates calendar events for you. Each event includes a side-by-side view of the original document source, so you can quickly verify accuracy and stay confident that nothing's been missed.

- Extracts deadlines directly from court documents
- Creates calendar events automatically
- Displays the original source for fast, reliable verification

This means no more double-checking filings or chasing down dates across multiple systems. Your schedule stays complete and compliant, helping you stay ahead of every deadline, every time.

## Plan your next move with confidence

Staying on top of everything your firm is managing can feel like a full-time job on its own. Manage AI keeps you one step ahead by turning data into proactive insights that help you plan smarter, not harder.

Using intelligent recommendations, Manage AI highlights which matters and tasks need your attention first—based on urgency, impact, and potential risk. It flags delays before they escalate, giving you time to act, and lets you customise the types of insights you want to see so your focus stays where it counts most.

- Surfaces what matters need attention next
- Prioritises tasks based on urgency and impact
- Flags risks or delays before they become issues
- Customizes recommendations to fit your workflow

With Manage AI, your day isn't just organised, it's strategically planned for maximum efficiency and peace of mind.

This means less time digging through paperwork and more time driving case strategy and decision-making, enabling you to close cases faster.

## Communicate: Craft client responses in seconds

Strong client relationships thrive on timely updates, but keeping everyone informed can take valuable time away from your work. Manage AI takes care of that by drafting thoughtful, professional client messages the moment there's something worth sharing, as well as:

- Suggests client updates automatically based on recent matter activity
- Drafts professional email messages ready for review
- Nudges you at the right moment to send updates
- Adjusts your tone of voice for every communication

Whether a task is completed, a document's uploaded, or a hearing date is set, Manage AI nudges you with ready-to-send drafts tailored to each situation. You can review, edit, and send in seconds—ensuring your clients always feel informed and supported. Soon, you'll even be able to adjust your tone of voice, making every message feel like it came straight from you.

## Keep every file organised and easy to find

Finding the right document shouldn't slow you down. Manage AI keeps your files clean, consistent, and searchable, without the manual effort.

- Suggests clear, structured file names based on classification
- Flags inconsistently named files for cleanup within the matter dashboard
- Offers a verify step to accept, edit, or reject AI suggestions
- Keeps matter files consistent and easy to find, reducing admin overhead

Using intelligent file recognition, Manage AI suggests clear, structured names (like *"Motion to Dismiss – Smith – March 3, 2025"*) based on the document type, client, and date. It flags inconsistently named files for review and gives you a simple verify step to accept, edit, or reject AI suggestions before they're applied.

The result? A tidy, professional document system that's easy to navigate and even easier to maintain, so your firm can stay focused on the work that matters.

### Bill with accuracy and ease

Invoicing shouldn't interrupt your day. Manage AI takes care of the details by generating polished, payment-ready bills the moment your work is done.

- Generates accurate, professional draft invoices automatically
- Populates expense entries with details from uploaded receipts
- Corrects typos and refines tone for client-facing clarity
- Routes bills to the right approvers and sends reminders
- Offers firm-level controls for scheduling and approval workflows

It automatically creates draft invoices, complete with expense entries pulled from your receipts and time records. Every bill is reviewed for accuracy and tone, ensuring your communications stay professional and client-ready. Manage AI also routes invoices to the right approvers, sends reminders, and gives firms granular control over scheduling and approval settings, so billing happens smoothly and on time, every time.

## Additional benefits of adding Manage AI to your legal tech stack

Beyond the five benefits above, Manage AI helps legal professionals work even faster and more confidently across every part of their day. These supporting capabilities extend the power of Clio Manage, giving firms more ways to save time, reduce context switching, and stay focused on high-impact work.

**Get up to speed, instantly**
Whether you're reviewing a case you haven't touched in weeks or onboarding a new client, Manage AI can summarise matters, review documents, and assist with setup. You'll have a clear, accurate picture of every file, without hours of manual digging.

**Analyse documents faster and spot key details**
Manage AI quickly identifies critical facts, clauses, and patterns within your documents, helping you find answers in seconds. No more scrolling through dense pages or re-reading for context, just the insight you need, when you need it.

**Stay focused, not busy**
Skip repetitive admin work. Manage AI can log time, schedule appointments, and create tasks or notes automatically, so you can stay in the flow of your most important legal work without constant context switching.

**Gain insights that keep you ahead**
Track performance and profitability in real time by asking Manage AI to generate custom reports. From productivity metrics to matter profitability, these insights help you make smarter, data-driven decisions with confidence.

**Trust your data is protected**
Manage AI operates within the same permissions you already have in Clio Manage, ensuring users only access information they're authorised to see. Your firm's data stays secure, private, and compliant, always.

**Work from anywhere in Clio Manage**

No need to jump between tabs or open a new window to access Manage AI. Built right into Clio Manage, you can pull up essential case details and delegate the creation of tasks, time entries, and calendar events as you work. Manage AI handles it with just a request, keeping you focused on your legal work. Let Manage AI take care of the little things so you can stay focused on the job at hand.

# What sets Manage AI apart from the rest

While many AI solutions are available, a few key factors set Manage AI apart, making it the leading choice for lawyers and legal professionals.

## Allows for secure AI adoption

When using open-source AI tools and chatbots, like ChatGPT, you can easily enter too much information or include sensitive information when attempting to summarise or find information within a document.

With Manage AI, you can harness the power of AI without concerns about compromising your clients' data. Manage AI operates securely with Clio Manage, our case management platform using only its data. No data is used to train large language models (LLMs)—ensuring full data safety and privacy. It respects user permissions, ensuring users can only access what they are authorised to see, control data access, maintain security, and minimise unauthorised access across your firm.

Learn more about Clio's industry leading security.

## Made for legal professionals

Manage AI harnesses your firm's data to deliver tailored legal insights that generic AI tools can't provide. It securely uses details you input into Clio Manage to instantly offer smart recommendations, generate matter summaries, and provide relevant details from your documents and case files that open-source AI simply can't handle as effectively.

Manage AI is designed with legal professionals in mind and is built specifically to transform the way legal work gets done within their case management software. As Manage AI evolves, it will continue to expand, offering even more automation features, all driven by Clio's commitment to delivering top-tier software that enables lawyers to focus on the work only they can do.

*Curious about other legal-specific AI tools and how Manage AI stacks up? Check out this guide: Navigating the Legal AI Ecosystem: Tools, Trends, and Adoption.*

# AI ethics and Manage AI

AI is your partner, but it won't replace you. While Manage AI automates many tasks, your legal expertise remains crucial for ensuring precision. Check for accuracy, check your bias, and use your professional judgment in reviewing AI outputs.

Ultimately, Manage AI is a tool to enhance, not substitute, ensuring that human insight and experience remain central to your practice. Clio is committed to doing AI the right way, equipping legal professionals with the tools they need to serve their clients better and run their practices more efficiently.

Adhering to ethics rules while leveraging the power of AI isn't just about compliance—it's a significant advantage. With Manage AI, you're not only keeping up with change but also setting a new standard for legal innovation and AI ethics in the legal space.

# Amplify your impact with Manage AI

Adopting Manage AI into your practice isn't just a smart decision—it's a strategic leap toward harnessing cutting-edge technology to better serve your clients. Manage AI places you at the forefront of legal innovation, empowering you to meet client needs with greater efficiency and confidence.

Ready to get started with Manage AI? Book your demo today to see it in action for your firm!

## 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.