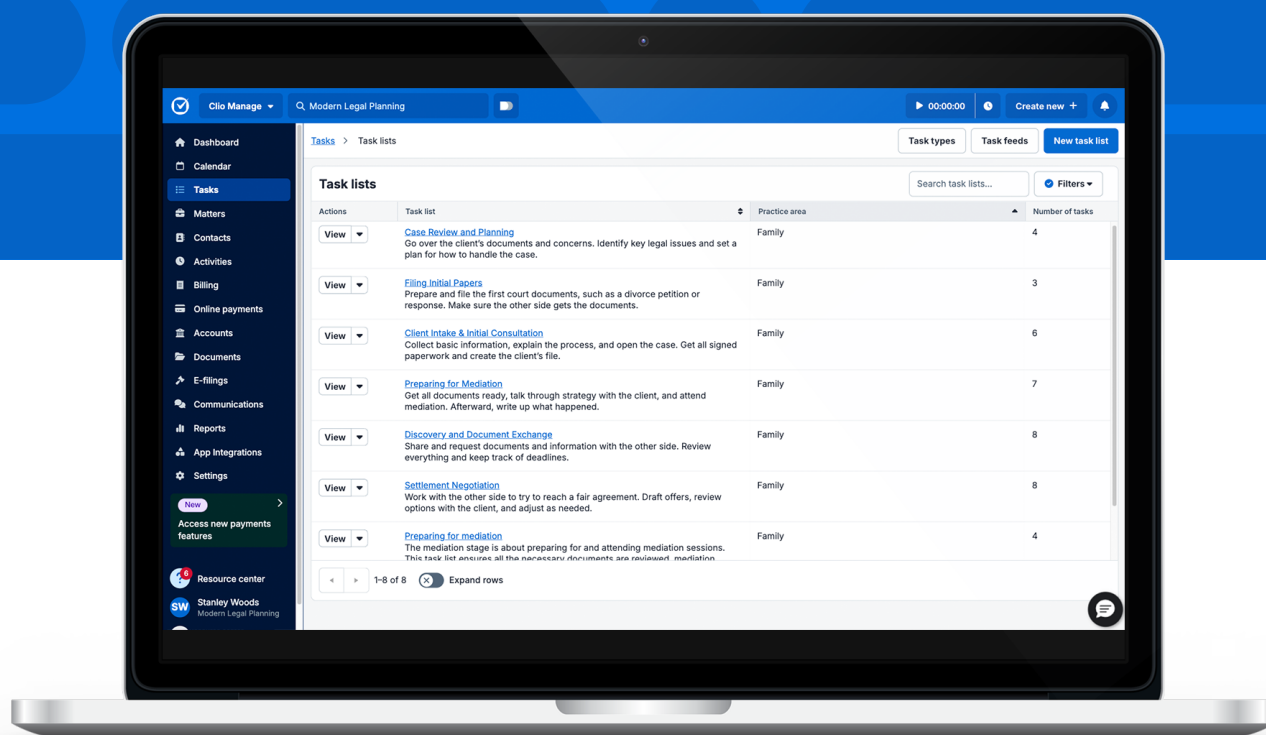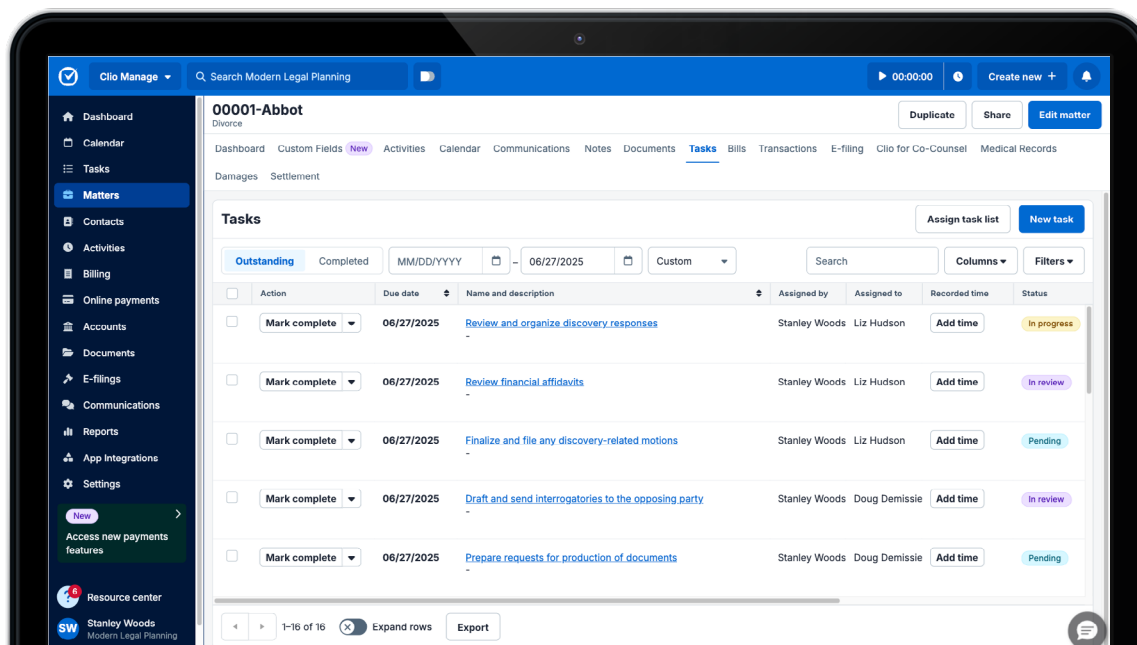# Task Lists
Best Practices Guide

Task lists in Clio Manage allow you to group related tasks and apply them to specific matters. They provide a clear overview of what needs to be done, who's responsible, and when each task is due—making it easier to stay organized and meet deadlines.

Task lists are included in all Clio Manage plans.

Here's how task lists can help your firm avoid missed steps, clearly assign responsibilities, and keep casework on track:

- **Keep deadlines visible.** View upcoming tasks at a glance or filter to see what's due today, so you can focus your time effectively.

- **Clearly assign tasks.** Ensure responsibilities are well defined, whether assigning tasks to yourself or to others.

- **Standardize your process.** Apply task lists across similar matters to create consistency and reduce setup time.

- **Make collaboration easier.** Task lists help keep everyone on the same page and ensure nothing gets missed along the way.

Get Started

Step 1

Start by outlining common steps and responsibilities across your case types. Identifying repeatable patterns will help you organize your work and build task lists that reflect how your firm handles different matters in Clio Manage.

For each task list, consider the following:

- **Task list name:** You can name task lists based on practice area and stage of work. For example, Litigation - Client Intake, Family Law – Discovery, Personal Injury – Court Filings, and Wills & Estates – Case Closing.

- **Description:** A brief description of what the task list covers and when to use it.

For each individual task within the list, start by defining:

- **Task name:** For example: Send client welcome email

- **Description:** A short summary of what the task involves

- **Assignee:** The person responsible for completing the task

- **Due date:** When the task should be completed, either a specific date or a relative due date (e.g., 2 days after the task list starts or after another task is completed)

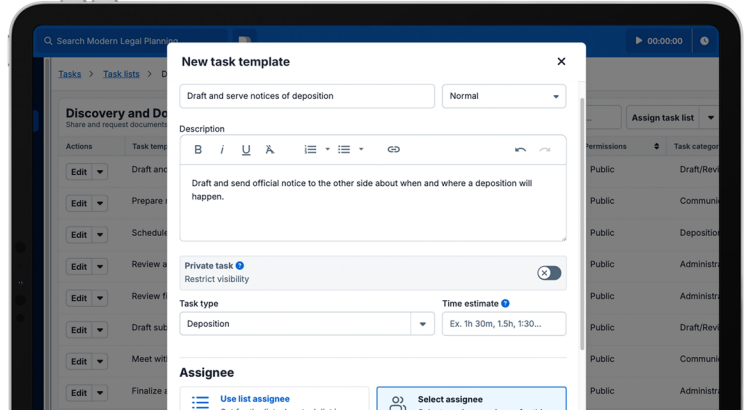- **Notes:** Any special instructions, conditions, or dependencies to consider

Step 2

To begin building your tasks in Clio Manage, go to the tasks tab and click create task lists.

Get Started

Step 3

Add tasks using the add task template option. Use clear names, assign responsibilities, and set due dates to keep everything organized and on track.

Step 4

Once your task lists are ready, assign them to the appropriate matter to begin working through each task.

Pro Tip

Looking to automatically assign tasks? You can set tasks lists to apply automatically when new matters are created or when they move from one matter stage to another, helping you and your team complete tasks efficiently and never miss a deadline.

See what's possible with advanced task features.

Best Practices

When creating task lists:

☐ **Write clear instructions**. Add detailed information for each task to reduce confusion and ensure anyone reviewing the list knows exactly what needs to be done.

☐ **Assign tasks.** Clearly indicate who is responsible for each task. Even if you're working on your own, assigning tasks helps you focus on what's next.

☐ **Use task dependencies.** Arrange tasks in the correct order to prevent steps from being done too early or missing important work that depends on previous tasks.

☐ **Duplicate task lists.** To create similar task lists for another case type, open the existing list, duplicate it, then rename, modify, and customize the tasks to fit the new case type.

After creating task lists:

☐ **Confirm responsibilities and deadlines.** Double-check that each task has an assigned owner and a clear due date to keep work on schedule and prevent missed tasks.

☐ **Keep tasks updated.** Regularly mark tasks as complete or update progress to get a real-time view of how work is advancing.

☐ **Adjust as priorities change.** Review and update tasks regularly as new items arise or priorities shift. Keeping task lists current ensures they always reflect your most important work.

Want more tips? Here are some helpful resources:

Join the community
Connect with other legal professionals using Clio through our forum.

Power up with Clio
Join us in a monthly webinar diving into best practices.

See what's new
Join our quarterly webinar featuring our latest product updates.

Have questions?
Visit Help Center or contact customer support at 1-888-858-2546

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