



Best Practices When Writing a Query

When interacting with Clio Duo through queries, following best practices can help you get the most accurate and useful responses. Use the following tips for crafting effective queries with AI tools like Clio Duo:

1 – BE SPECIFIC AND CLEAR:

Clearly state what information or action you're seeking. Specific queries yield more precise answers.

- For example, instead of asking, "What's happening with my case?" ask, "What is the status of the John Doe case?"

2 – USE SIMPLE LANGUAGE:

Avoid jargon or complex phrasing. Simple, direct language is easier for Clio Duo to understand.

- For example, instead of, "Elucidate the chronology of events" ask, "Show me the timeline of events for the John Doe case."

3 – CONTEXT MATTERS:

When submitting a query to Clio Duo, it's important to consider your current context within Manage, as it impacts the results you receive. Duo tailors its responses based on the specific matter or document you are working on.

- For example, if you're viewing a case file and ask, "Summarize this matter" Duo will use details from that specific case. However, if you're on your dashboard and ask, "What's the latest document?" without specifying the matter, the results may be less accurate. To improve relevance, ask, "What is the latest document added to the John Doe case file?" This way, Duo can tailor its response based on your location in Manage.

4 – GO STEP BY STEP:

If your question is complex, break it down into smaller, more manageable parts.

- For example, instead of asking, "Summarize the John Doe case and draft a response to the client's inquiry" first ask, "Summarize the John Doe case" then, "Draft a response to the client's latest inquiry."

5 – REFINE YOUR QUESTION:

Generative AI responds to the way you ask questions. If you don't get the answer you're looking for, try rephrasing your question or ask a follow-up to get more specific information.

- For example, if "Show recent activities for John Doe" doesn't give you the needed details, try, "List recent emails and meetings for John Doe."

6 – QUERY FOR INTENDED TASKS:

Ask Clio Duo questions related to tasks it's built for, like legal matters and case management, and avoid queries outside this scope.

- For example, avoid asking general knowledge questions such as “What’s important for the John Doe case?” Instead, try “List the tasks for the John Doe case.” You can also ask Duo to summarize a matter or find specific information from legal documents; create tasks or calendar events; or add time entries.

7 – VERIFY AND VALIDATE:

As with any generative AI response, double-check Clio Duo’s responses for accuracy and completeness, especially for critical tasks.

- For example, review the Duo-generated document summaries or responses before sending them to clients.



By following these best practices, you can enhance the effectiveness of your interactions with Clio Duo, ensuring you get accurate and helpful responses tailored to your specific needs.

Questions about Clio Duo? To reach Clio support,
Call 1-888-858-2546 ext. 2; email support@clio.com; or chat with us in-app.
