

How Clio Future-Proofs Support and Autonomously Resolves 60% More Tickets With Maven AGI



80%

Inquiries answered autonomously via chat

4x

faster live support for technical questions due to lower ticket volume

60%

more tickets solved (vs legacy chatbot)



George Sullivan
Senior Director of Customer Support

“We knew that we could do better than our legacy chatbot solution. Maven’s cutting-edge platform transformed our customer support experience overnight.”

INTRODUCTION

See how this global leader in legal AI teamed up with Maven to launch an intelligent chat support function that delights customers across the world.



Challenge

Modernizing Chat Support for the Next Stage of Growth

After rapidly redefining legal work for small and midsize firms, Clio geared up to roll out a [new suite of offerings](#) aimed at the enterprise market. This launch would propel the company into the next chapter of innovation. Catering to this new market would also require [George Sullivan](#), senior director of customer support, to level up Clio’s [chat support system](#).

While George and his team used a legacy chatbot solution to give customers instant answers to routine inquiries, it showed limitations at scale. Because of the chatbot’s rigid, rule-based architecture, it could only answer the questions it had been pre-scripted to pull from Clio’s help desk pages. Retraining required frequent, manual reconfigurations, and was a source of customer frustration for George’s team.

Answering those chat inquiries, many of which were repetitive, also ate into the team’s bandwidth for high-complexity technical tickets. With their resources stretched, the team often resorted to escalating tickets to a second line of technical specialists for complex questions. Although every ticket was still handled with deep care, these escalations extended resolution times and made it harder for the frontline team to build meaningful connections with customers.

To see their team through the next stage of customer growth, Clio’s new tech partner would need to:

- Automatically and accurately answer routine, in-app chat inquiries
- [Deeply integrate](#) with Clio’s tech stack, including Salesforce
- Provide on-demand and iterative support

Knowing this issue would compound as Clio acquired larger customers, Clio decided to prioritize a true, [GenAI-native](#) chat solution. [Brandon Cheng](#), leader of Clio’s GTM Applications team, stress-tested 10+ leading vendors in the [AI agent](#) space, and Maven AGI was the only one to consistently deliver on all three fronts. After gathering impressive reviews from several existing Maven customers, Brandon, George, and their teams jumped in.

“In our evaluation, Maven demonstrated the best performance, in both efficiency and quality, and their team stood out for their responsiveness.” – George

About us

Clio is the global leader in legal AI technology and has produced a suite of products through the Intelligent Legal Work Platform that unifies case management, legal research, and document automation to help legal professionals work faster and more efficiently. Trusted by hundreds of thousands of legal professionals in more than 130 countries, Clio supports firms at every stage of their practice. With approvals from over 100 bar associations and law societies worldwide, it sets the standard for legal innovation and success.

Solution

Powering Next-Gen, Self-Serve Support With Agent Maven™

Maven gave Clio’s team the scalable support framework they needed to show up for their expanding, increasingly multi-product customer base.

During a 6-week onboarding, the Maven team formed a strong partnership with the Clio team, and guided them through the process with thought and care. While a dedicated CSM oversaw the process, Maven’s Forward Deployed Engineers provided on-demand technical assistance. Implementation engineers also built a rich [Salesforce integration](#) and trained [Agent Maven™](#) on Clio’s brand voice and knowledge base. “The way Maven has partnered with us, both during onboarding and beyond, is just so thoughtful and holistic, and gives us great confidence in our ability to achieve success together,” George says.

The Clio team initially deployed Agent Maven™ to a select group of pilot customers, and it outperformed their previous solution from day one. Whether it was fielding billing questions or guiding customers through automated intake and workflows, Agent Maven™ consistently gave concise, digestible responses while maintaining [airtight security and compliance standards](#).

After positive feedback from the beta group, Brandon, George, and team deployed Maven across their North America customer base and, within weeks, globally. Today, Agent Maven™ tackles the vast majority of chat questions across Clio’s global customer base. However, if there are any questions it can’t answer with 99% confidence, it escalates to a live Clio rep via Salesforce Messaging. Because Maven’s handoffs include the full chat history and relevant customer information, the human agent can always jump in with full context.

Agent Maven™’s high independent resolution rates and smooth escalations drove frontline efficiencies right away. Even so, George’s favorite thing about the platform is its iterability. In the Maven Agent Designer dashboard, his team’s dedicated AI analyst can easily review conversation transcripts, identify knowledge or quality gaps, and make the relevant updates to their knowledge base or the chat agent’s persona. Thanks to Maven’s [lightweight, no-code workflow builder](#), the analyst ships these improvements quickly.

These updates also directly benefit the support team by driving continuous improvement with every iteration. As Maven handles more routine tickets, reps upskill their technical knowledge and reclaim time to directly support their customers on more complex questions. Meanwhile, removing the extra escalation layer means customers get answers to those questions almost instantly.

Best of all, Maven’s impact on the customer experience is showing up downstream in the form of positive customer feedback. George sees this as the strongest signal yet that Clio is well-equipped to continue to scale while providing a world class support experience.

“Maven makes DIY and self-help easy. Because the product is so agile and flexible, we’re able to rapidly iterate to improve agent performance. Thanks to Maven’s reporting insights, we’re also able to quickly identify and close gaps in our customer-facing knowledgebase, enabling self-help and improving performance.” – George

Results

Automating 80% of Chat Inquiries and Reclaiming Time for High-Touch Tickets

With Maven, Clio updated its chat function for the era of agentic AI, turning support from a bottleneck into an efficient workflow that can drive expansion. Now, George’s team answers more inquiries faster while reclaiming time to build deep customer connections.

Maven specifically enables:

- >80% of inquiries answered autonomously via chat
- 60% more tickets solved (vs legacy chatbot)
- 4x faster live support for technical questions due to lower ticket volume

What’s next? After plugging into Maven’s growing peer community and collaborating on new ways to get more from the platform, George is excited to deploy new use cases. In fact, he is already introducing Maven’s AI agents beyond support and into Clio’s customer success, sales, and education workflows.

George expects AI agents to play a substantial role in engaging customers pre- and post-sale, further advancing Clio’s mission to build legal AI technology that is client-centered, will increase access to justice, and transform the legal experience for all.

“Maven is an excellent partner with great products and we’re excited to continue to work and grow together as we expand into additional use cases to improve the customer experience.” – George

