

DATA INTELLIGENCE USE CASES

# Mining Your Firm's Data with *AI*

Eight high-value workflows for attorneys using LawLink's MCP server to extract strategic intelligence from their practice data — turning existing records into revenue, efficiency, and competitive advantage.

The Clio Legal Trends Report found that law firms using data to drive strategic decisions are **33% more likely to grow revenue year over year**. The challenge isn't access — most firms already have years of rich practice data sitting in their case management systems, billing records, contact databases, and document servers. The challenge is *activation*: turning raw operational data into actionable intelligence without building a separate analytics department.

LawLink's MCP server connects Claude directly to your firm's live data — matters, contacts, billing records, notes, documents, and pipeline — so attorneys can ask natural-language questions and get real answers from their own practice history. No exports, no dashboards, no switching applications. Just a conversation that surfaces exactly what you need to make smarter decisions, faster.

These eight use cases focus specifically on **data intelligence workflows**: understanding revenue drivers, identifying inefficiencies, benchmarking performance, and converting institutional knowledge into competitive strategy.

## USE CASES

**D1** Practice Area Revenue Analysis

REVENUE

**D2** Billing Efficiency & Realization Rate Audit

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PRICING

D1

## Practice Area Revenue Analysis

REVENUE INTELLIGENCE

Most firms have a general sense of which practice areas are "busy," but few know which ones are actually most profitable per hour invested. With LawLink's MCP server, attorneys and firm managers can ask Claude to pull closed matter data across a time period, segment by practice area, and surface which work types generated the most revenue, the highest realization rates, and the best return on attorney time — directly from the system of record, in a single conversation.

**Core value:** Claude queries matter and billing data from the firm's system of record to produce a live practice area revenue breakdown — identifying which work types drive growth, which are underperforming, and where to focus business development without building a single report or exporting a single spreadsheet.

### EXAMPLE PROMPTS IN CLAUDE.AI

- " Break down our billed revenue by practice area for the last 12 months and tell me which three generated the most fees.
- " Which matter types in Clio have the highest average fee per closed matter over the past two years?
- " Compare our PI and family law matters — which practice area has higher average billed hours and what's the revenue difference?

### WHAT THE ATTORNEY GETS

- › Revenue broken down by practice area directly from matter records — no manual spreadsheet required
- › Average fee per matter and per hour by case type to identify highest-value work
- › Year-over-year comparison of practice area performance to spot trends
- › A data foundation for business development, staffing, and marketing decisions

### MCP TOOLS USED

- › `matters → list` filtered by status, date range, and practice area
- › `matters → get` for fee, billed hours, and outcome data per matter
- › `connections → list_platforms` to confirm CMS and billing source

## D2

## Billing Efficiency & Realization Rate Audit

### BILLING INTELLIGENCE

Unbilled time and written-off fees are among the largest sources of invisible revenue loss at law firms. The average attorney fails to capture a significant portion of their working hours as billable time — and of the time billed, a further percentage is discounted or written off. With LawLink's MCP server, attorneys can ask Claude to audit their own billing records: identifying time gaps, write-down patterns, and matters where realized revenue consistently falls short of billed fees.

**Core value:** Claude surfaces unbilled time, write-off patterns, and realization gaps directly from the firm's billing records — giving attorneys an honest look at where revenue is leaking and what changes would have the highest impact on collected fees.

#### EXAMPLE PROMPTS IN CLAUDE.AI

- " Show me all matters from the last 90 days where billed time has not been invoiced yet — flag anything over 5 hours unbilled.
- " Which of my active matters have the largest gap between billed fees and collected fees in the last six months?
- " Pull all matters where I wrote off more than \$500 in the last year and summarize the reasons noted.

#### WHAT THE ATTORNEY GETS

- › A live list of matters with unbilled time exceeding a threshold — actionable and sorted by size
- › Realization rate by matter, client, or practice area to identify collection problem patterns
- › Write-off history surfaced with associated notes to diagnose recurring issues

#### MCP TOOLS USED

- › `matters → list` filtered by billing status and date range
- › `matters → get` for billed vs. collected fee data per matter
- › `notes → list` to surface write-off rationale and billing notes

- › An audit that would take hours of manual review delivered in a single conversation

PLATFORMS:

Clio Manage

Filevine

Lead Docket

LAWLINK.AI · MCP SERVER

LawLink.ai  
CONNECTING THE LEGAL ECOSYSTEM

D3

## Matter Profitability Benchmarking

STRATEGIC INTELLIGENCE

Not all matters are equal — even within the same practice area. Some clients generate consistent, high-margin work; others consume disproportionate attorney time relative to the fees collected. With LawLink's MCP server, attorneys can benchmark individual matters against historical averages for the same case type, identifying outliers that are over-serviced, underpriced, or stalled — and using that data to make smarter decisions on similar matters going forward.

**Core value:** Claude compares the current matter's fee, hours, and phase against the firm's closed-matter history for the same case type — giving the attorney an immediate benchmark for whether the matter is on track financially and operationally, without pulling a single report.

### EXAMPLE PROMPTS IN CLAUDE.AI

- " Compare the Torres PI matter to our average closed PI case — how does total billed time, fees, and phase duration compare?
- " What's the average fee we collect on family law matters that go to trial versus those that settle? Pull that from closed matters.
- " Which of my active matters are significantly over the average hours for their case type based on our historical data?

### WHAT THE ATTORNEY GETS

- › A live benchmark comparing current matter performance to historical averages for the same case type

### MCP TOOLS USED

- › `matters → list` closed matters filtered by practice area or case type

- › Identification of over-serviced matters before they become profitability problems
- › Data-backed fee estimates for new matters based on actual firm history — not intuition
- › Outcome comparisons (settlement vs. trial) to inform strategy decisions on active matters

- › `matters → get` for fee, hours, duration, and outcome data
- › `notes → list` for outcome notes and resolution context

PLATFORMS:

Clio Manage

Filevine

Lawmatics

File server of record

LAWLINK.AI · MCP SERVER

LawLink.ai  
CONNECTING THE LEGAL ECOSYSTEM

D4

## Client Retention & Relationship Intelligence

CLIENT MANAGEMENT

Retaining existing clients costs far less than acquiring new ones — and repeat clients are typically more profitable, require less intake friction, and refer more new business. Yet most firms don't systematically track which clients have returned, which have gone silent, or which high-value clients haven't had a touch-point in months. With LawLink's MCP server, attorneys can surface client relationship data from their system of record and identify opportunities to re-engage before they become lost business.

**Core value:** Claude queries the firm's contact and matter data to produce a relationship intelligence view — identifying high-value clients with no recent activity, clients whose matters closed without a follow-up, and referral sources that have gone quiet — turning passive contact records into an active retention strategy.

EXAMPLE PROMPTS IN CLAUDE.AI

- " Show me clients who had more than two matters with us but haven't had any activity in the last 12 months.
- " Which clients generated over \$10,000 in fees in prior years but have no open matters or recent notes right now?
- " Pull all contacts marked as high-value in Clio where the last note is older than 90 days — I want to do outreach this week.

#### WHAT THE ATTORNEY GETS

- › A ranked list of lapsed high-value clients segmented by last activity date and prior fee history
- › Clients whose matters closed without any recorded follow-up — a systematic retention gap
- › A ready-to-act outreach list generated from live CMS data, not a static spreadsheet
- › Relationship health view across the entire client base in a single conversation

#### MCP TOOLS USED

- › `contacts → search` filtered by relationship type and last-activity date
- › `matters → list` by contact ID to surface matter history and fee totals
- › `notes → list` sorted by date to confirm recency of last touch-point
- › `contacts → get_custom_fields` for value tier and relationship metadata

SYSTEM OF RECORD:

Clio Manage

Filevine

Lawmatics

Lead Docket

LAWLINK.AI · MCP SERVER



D5

## Intake Conversion Rate Analysis

BUSINESS DEVELOPMENT

Firms investing in marketing and lead generation often have no clear picture of which intake sources convert to signed clients at the highest rate — or where prospective clients drop off in the intake process. With LawLink's MCP server, attorneys using Lead Docket or Lawmatics can ask Claude to analyze their lead pipeline data: which referral sources convert best, how long leads take to sign by case type, and which intake stages have the highest drop-off — without running a single manual report.

**Core value:** Claude surfaces intake conversion patterns directly from the firm's CRM pipeline data — identifying which lead sources and case types convert at the highest rate, where the intake process stalls, and which prospects are most worth pursuing — giving attorneys a data-driven foundation for every business development decision.

EXAMPLE PROMPTS IN CLAUDE.AI

- " What percentage of PI leads from referral sources converted to signed clients last quarter compared to web leads?
- " Show me the average days from first contact to signed retainer by case type in Lead Docket over the last 6 months.
- " Which intake stages have the most leads stuck in them right now — and how long have they been there?

#### WHAT THE ATTORNEY GETS

- › Conversion rates by lead source, case type, and intake stage pulled from live pipeline data
- › Average time-to-sign by case type — identifying where intake velocity can be improved
- › Stage-by-stage dropout analysis showing where prospective clients are lost in the process
- › A data-backed answer to "which marketing channel is actually working" without a separate analytics tool

#### MCP TOOLS USED

- › `matters → list` with status and source filters across pipeline stages
- › `matters → get` for intake date, signed date, and case type per lead
- › `contacts → get_custom_fields` for referral source and lead-scoring metadata
- › `notes → list` to surface intake notes and rejection reasons

PLATFORMS:

Lead Docket

Lawmatics

LAWLINK.AI · MCP SERVER

LawLink.ai  
CONNECTING THE LEGAL ECOSYSTEM

D6

## Attorney Productivity & Workload Balancing

OPERATIONS

Managing a firm means understanding not just how many matters each attorney is carrying, but whether those matters are moving, whether time is being captured, and whether certain attorneys are consistently over- or under-utilized. With LawLink's MCP server, firm managers and supervising attorneys can query live workload data across the team — without asking each attorney for a manual update or pulling reports from the billing system.

**Core value:** Claude surfaces each attorney's active matter load, recent billing activity, and task completion rate from the system of record — giving supervising attorneys an instant operational picture of team capacity and productivity without a single dashboard or status meeting.

EXAMPLE PROMPTS IN CLAUDE.AI

- " How many active matters does each attorney currently have in Clio and what is their total billed hours in the last 30 days?
- " Which attorneys have matters that haven't had a note or task update in more than two weeks — flag those for me.
- " Show me open tasks overdue by more than 7 days across all active matters and which attorney owns each one.

WHAT THE ATTORNEY GETS

- › A real-time workload view by attorney — active matter count, billed hours, and task backlog
- › Stalled matter identification: cases with no notes, tasks, or billing activity in a defined window
- › Overdue task lists by attorney to support accountability without manual check-ins
- › The data needed for fair, evidence-based matter assignment and workload redistribution

MCP TOOLS USED

- › `matters → list` filtered by assigned attorney and active status
- › `tasks → list` filtered by due date and completion status
- › `notes → list` sorted by date to identify stalled matters
- › `matters → get` for billed hours and phase data per matter

SYSTEM OF RECORD:

Clio Manage

Filevine

Lawmatics

LAWLINK.AI · MCP SERVER

LawLink.ai  
CONNECTING THE LEGAL ECOSYSTEM

D7

## Referral Source ROI Tracking

MARKETING INTELLIGENCE

Most law firms invest significantly in referral relationships — with other attorneys, medical providers, financial advisors, and prior clients — but few track which referral sources actually generate the highest-value matters. With LawLink's MCP server, attorneys can ask Claude to analyze closed matter data by referral source, surfacing which relationships drive the most revenue, the highest average case value, and the best conversion from referral to signed client — making referral cultivation a data-driven discipline rather than a gut-feel activity.

**Core value:** Claude traces every closed matter back to its referral source and calculates revenue generated per source — giving attorneys a clear, ranked picture of which relationships are worth cultivating, which are underperforming their investment, and where new referral development would have the highest return.

#### EXAMPLE PROMPTS IN CLAUDE.AI

- " Rank my top 10 referral sources from the last two years by total fees generated from matters they sent us.
- " Which referral sources send us the highest average case value and which send volume but low-value matters?
- " Have any of my historically strong referral sources gone quiet in the last 6 months? Pull sources with no new referrals.

#### WHAT THE ATTORNEY GETS

- › A ranked referral source list by total revenue generated — the clearest possible ROI picture
- › Average case value per referral source to distinguish volume referrers from value referrers
- › Lapsed referral source identification — relationships worth re-cultivating before they cool further
- › Data to guide relationship investment: lunches, gifts, reciprocal referrals, and event invitations

#### MCP TOOLS USED

- › `contacts → get_custom_fields` for referral source and relationship type fields
- › `matters → list` filtered by referral source contact ID and closed status
- › `matters → get` for fee totals and case type per referred matter
- › `notes → list` to surface last interaction with each referral source

SYSTEM OF RECORD:

Clio Manage

Filevine

Lead Docket

Lawmatics

D8

## Fee & Pricing Strategy Optimization

PRICING INTELLIGENCE

Attorneys often set fees based on market intuition or prior precedent rather than data from their own case history. With LawLink's MCP server, attorneys can ask Claude to analyze how prior matters were priced, how actual fees compared to initial estimates, which case types consistently ran over budget, and what flat fee structures would be profitable based on historical hours — turning the firm's own closed-matter database into a precision pricing engine for future work.

**Core value:** Claude analyzes the firm's closed-matter fee and time data to surface pricing intelligence — identifying case types where fees are consistently mis-estimated, where flat fee arrangements would be profitable, and what rate adjustments would most improve realization — giving attorneys the data to price confidently and competitively.

### EXAMPLE PROMPTS IN CLAUDE.AI

- " *What's the average actual billed time on uncontested divorce matters versus the flat fee we charge — are we pricing those profitably?*
- " *Which case types have the highest variance between estimated and actual fees in our closed matters from the last two years?*
- " *I'm quoting a complex commercial litigation matter — pull our last five comparable cases and tell me the range of total fees billed.*

### WHAT THE ATTORNEY GETS

- › Estimated vs. actual fee comparison by case type — identifying systematic under- or over-pricing
- › Historical fee ranges for comparable matters to anchor new client quotes in real data
- › Flat fee profitability analysis: which case types are consistently within a predictable hour range
- › A rate review foundation: where billing rate increases would have the highest revenue

### MCP TOOLS USED

- › `matters → list` closed matters filtered by case type and fee arrangement
- › `matters → get` for estimated fee, billed hours, collected fees, and billing type
- › `notes → list` for budget discussions and fee agreement notes per matter

impact

> `contacts → get` for client tier and rate  
schedule applied

PLATFORMS:

Clio Manage

Filevine

Lawmatics



## Mining Your Firm's Data with AI

LawLink.ai · Data intelligence use cases

MCP Connector setup: [app.lawlink.ai/doc/mcp\\_connector\\_setup.html](http://app.lawlink.ai/doc/mcp_connector_setup.html)

Free trial: [lawlink.ai/lawlink-ai-for-claude](http://lawlink.ai/lawlink-ai-for-claude) · April 2026

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