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3 Ways Troutman Used AI Tools to Streamline Its Firm Merger

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Dan Pulka, Troutman Pepper Locke's Chief Business Development & Marketing Office, and Will Gaus, Troutman Pepper Locke's Chief Knowledge Management and Innovation Officer, were quoted in the May 8, 2025 *Law360 Pulse* article, "3 Ways Troutman Used AI Tools to Streamline Its Firm Merger."

Dan Pulka, chief business development officer at Troutman Pepper Locke LLP, recently told *Law360 Pulse* that being fresh out of the Pepper Hamilton merger, Troutman leaders were able to reflect on what they did during that merger and how they could improve on those things in the combination with Locke Lord.

Pulka said Troutman used generative artificial intelligence tools to make it easier for employees to navigate management communications about the merger and to speed up the process of editing Locke Lord attorney bios and headshots for its website.

Pulka said one thing Troutman decided to do differently was leverage its internal generative artificial intelligence tool Athena to make it easier for employees to navigate management communications about the merger.

Troutman created a microsite dedicated to merger information, where employees from both firms could ask Athena questions about the combination, such as, "Who's our insurance provider?" or "What's our new work hour schedule?" Pulka said.

"We knew from our 2020 merger that people can get overwhelmed with the amount of information being communicated, and we had a lot of good content, and we wanted to make it easier for people to navigate and absorb that content," he said.

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Athena leverages large language models from OpenAI through Microsoft Azure hosted in a private cloud environment, according to Will Gaus, chief knowledge management and innovation officer at Troutman.

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Pulka noted that the microsite gave Locke Lord attorneys a chance to test out Athena before the law firms officially combined. He added that the firm was able to tailor its communications based on data of what employees were

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asking Athena.

“If people asked the same question repeatedly, we’d add an FAQ to the site or share information in a new format with everyone,” he said.

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Gaus said the version of Athena that was accessible through the microsite was designed to answer questions specifically about the merger.

Troutman’s AI solutions team used prompt engineering and retrieval-augmented generation to ensure that Athena answered questions about the merger correctly, according to Gaus.

Pulka said the microsite took about six to eight weeks for Troutman to build before the merger vote, and the firm continually updated the site during and after the merger.

“Absolutely worth every minute of it, because of how it helped pull the two firms together before the merger and then after the merger,” Gaus said.

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Troutman also used generative AI to rewrite Locke Lord attorney bios for its website, according to Pulka and Gaus.

Gaus said Troutman’s innovations captive development team built an agentic AI workflow using Microsoft’s AutoGen that rewrote Locke Lord attorney bios to match the format Troutman uses for bios on its website.

Pulka added that when Troutman merged with Pepper Hamilton, it took four people two months to rewrite 400 attorney bios. The agentic AI workflow took about three weeks to build and was able to convert 500 attorney bios in one weekend, Pulka said.

He noted that humans still needed to review the attorney bios after they were converted by the agentic AI workflow.

“These are exactly the types of things that agents are designed to do in the short term,” Gaus said.

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Pulka said some of the Locke Lord headshots were not cropped correctly, or their resolution was too low to be used on Troutman’s website.

Out of 500 attorney headshots, only about 40 photos couldn’t be fixed using AI, Pulka said, adding that not having to retake hundreds of photos saved the firm $250,000.

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Gaus said that most BigLaw firms have the technical capabilities to use generative AI tools in their mergers like Troutman, but some might not have firm leadership on board with using generative AI in a merger.

“[What] is fairly unique to the culture of both firms is the expectation that we’re going to use these tools to make this as painless and efficient as possible,” he said. “That’s probably the biggest difference, is that our leaders trust us and expect us to do these things.”

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