

# eMerge: Latest News and Developments – August 2025

## WRITTEN BY

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Our eMerge team is excited to share the following updates:

- **Client Care Survey:** Coming soon via email — keep an eye out!
- **Case Study:** Remote, targeted mobile device discovery.
- **Awards and Recognition:** Vote for eMerge Split!
- **Thought Leadership:** Microsoft 365 eDiscovery and Copilot updates and more.
- **Events and Speaking Engagements:** Discover the latest insights and updates on Microsoft 365.

Troutman Pepper Locke's award-winning eDiscovery, data management, and AI subsidiary, [eMerge](#), offers clients integrated technology and legal solutions to address complex data-driven problems in litigation, transactional and compliance matters, government investigations, and information governance initiatives.

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## Client Care Survey

To ensure eMerge is delivering exceptional service to all its clients, both internally and externally, we will periodically request feedback through client satisfaction surveys. Please look out for these surveys via an automated external email from Alison Grounds with the subject line, "Troutman eMerge Client Satisfaction Survey – [Name of current matter]."

Hello,

Thank you for your partnership with Troutman Pepper Locke eMerge! We are committed to delivering exceptional service and would value your insights on your recent experience with us regarding the matter: *O\_eMerge Administrative*.

Your feedback is invaluable to us, and we kindly ask you to share your confidential feedback at this [link](#). This survey should take no longer than five minutes to complete.

If there is someone better suited to fill out this survey, please feel free to forward them this email.

If you have any questions or prefer to have a live conversation, please reach out to our Client Success Manager – [julianne.bruno@troutman.com](mailto:julianne.bruno@troutman.com) who will contact you personally.

Thank you,

Your eMerge Team

troutman  
**emerge**



Thank you for taking the time to complete our client satisfaction survey. Your feedback is invaluable to us. We appreciate your support and look forward to continuing our partnership in the future.

This survey is in connection with: *O\_eMerge Administrative*, but please feel free to include any general feedback you have for eMerge.

How likely are you to recommend eMerge to a colleague or client based on your experience with our team? 1 being very unlikely and 10 being very likely. \*

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

How satisfied are you with eMerge's responsiveness? 1 being very unsatisfied and 7 being very satisfied. \*

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7

How satisfied are you with the counseling, consulting, and strategic advice provided by eMerge? 1 being very unsatisfied and 7 being very satisfied. \*

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7

How satisfied were you with the work product/deliverables provided by eMerge? 1 being very unsatisfied and 7 being very satisfied. \*

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7

Regarding eMerge's costs and fees, which of the following best matches your experience: \*

- ☐ eMerge effectively communicated cost estimates (including reasonable changes) and ultimately came in at or under my cost expectations
- ☐ eMerge communicated estimated costs but then exceeded those costs without reasonable explanation
- ☐ eMerge did not communicate estimated costs but nevertheless came in at or under my cost expectations
- ☐ eMerge did not communicate estimated costs and was more expensive than I anticipated
- ☐ Other

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## Insurance Litigation Case Study: Mobile Device Discovery

eMerge was engaged to manage the discovery process in a complex insurance litigation matter where the client faced a fast-approaching discovery deadline involving multiple custodians' mobile devices. The challenge was familiar: collect and prepare relevant mobile data for review and production, while minimizing custodial disruption and protecting unrelated, personal, and confidential client information.

Instead of conducting a complete forensic acquisition of each mobile device, eMerge deployed ModeOne's mobile collection technology to efficiently target only the potentially relevant data for collection. eMerge's ModeOne-powered collections proceed as follows:

- *First*, eMerge works with the custodian or their IT designee to install the ModeOne application directly on the target Android device or on a computer to which a custodian can connect their iOS device.
- *Second*, eMerge's collection analysts remotely access the device to identify the specific categories of data subject to collection, such as photos, videos, messages, phone logs, and contacts.

- *Third*, ModeOne uploads the data to a secure cloud environment.
- *Finally*, eMerge filters the data as needed and exports the results in a format amenable to efficient review, such as Relativity Short Message Format (RSMF).

Utilizing ModeOne substantially accelerates collection timelines, reduces the risk of overcollection, and safeguards personal and confidential information. On the complex insurance matter, we completed a process that typically takes days in hours, yielding significant downstream review and production savings. eMerge has a variety of collection tools and can identify a defensible approach suitable to each matter.

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## Awards and Recognition

### Vote for eMerge Split!

We are pleased to share that eMerge Split!, developed by eMerge's Custom Solutions team, has been nominated for the 2025 [Relativity](#) Innovation Awards for Best Innovation: Organize. The Relativity Innovation Awards' Organize award celebrates innovations that transform the way we store, structure, collect, process, and organize critical data. Click [here](#) to learn more and vote for eMerge Split!

### Troutman Pepper Locke Announces 2025 *Legal 500* US Rankings

eMerge has been ranked by *Legal 500* in the Dispute Resolution: eDiscovery category. This prestigious recognition underscores our unwavering commitment to delivering exceptional service and innovative solutions to our clients. We are delighted to highlight the individual accolades received by **eMerge Managing Partner Alison Grounds**, **Principal Jim Calvert**, and **Principal Jason Lichter**, who were mentioned in the 2025 edition. Alison was recognized as a "leading lawyer." Click [here](#) to read more.

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## Thought Leadership

### Cleared for Takeoff? Copilot Legal and Technical Preflight Checklist

Millions of companies use the Microsoft 365 suite of tools every day to create, communicate, and collaborate, but far fewer have adequately grappled with the legal risks introduced by Copilot, the powerful generative AI assistant embedded in those same applications. While Copilot can enhance employee productivity, creativity, and connectivity, it may do so at the expense of privacy, security, and compliance without adequate planning and oversight. Click [here](#) to read the full article authored by **eMerge Principal Jason Lichter**.

### Microsoft 365 eDiscovery Updates

Microsoft released its new unified eDiscovery experience (Purview eDiscovery) within the Purview portal. Microsoft describes Purview eDiscovery as "a modernized user interface for key eDiscovery workflows, with simplified creation for cases, searches, and holds." Click [here](#) to read the full update.

### Navigating the Maze: eDiscovery Essentials for Employers

In this episode of *Hiring to Firing*, Partners **Tracey Diamond** and **Emily Schifter** explore eDiscovery processes and procedures with **eMerge Managing Partner Alison Grounds**. Learn about the importance of eDiscovery in

litigation and the complexities of managing electronic data. Click [here](#) to listen to the podcast episode.

## **Harnessing the Power of eDiscovery: The Revolution of AI and Technology in Litigation and Investigations**

In this episode of *The Consumer Finance Podcast*, Partner [Chris Willis](#) is joined by Partners [Joseph DeFazio](#) and [Jason Manning](#), along with eMerge Managing Partner [Alison Grounds](#), to discuss the evolving capabilities and advantages of eDiscovery. This episode highlights the significance of efficient processes in streamlining document review to enhance legal strategies, including setting clear policies for electronically stored information (ESI) and analyzing vast volumes of digital data with accuracy. Click [here](#) to listen to the podcast episode.

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### **Events and Speaking Engagements**

#### **Webinar – ESI Protocols**

Our team discussed the benefits and risks of drafting protocols for the exchange and handling of ESI in litigation. The presentation included strategic tips on drafting, revising, and negotiating protocols, highlighting essential elements and common pitfalls to help minimize eDiscovery disputes. Click [here](#) to view the recording.

#### **Webinar – Microsoft 365 eDiscovery Updates**

eMerge hosted a webinar exploring the latest changes to Microsoft 365 Purview's eDiscovery solution. View the [webinar recording](#).

#### **Webinar – Transcript Tactics: Best Practices for Deposition Review in the Age of AI**

eMerge Director of Legal Technology [Antonio Avant](#) presented on AI-enhanced deposition preparation during a webinar hosted by the Association of Certified E-Discovery Specialists. Antonio and the other panel members discussed how to efficiently and accurately analyze deposition transcripts.

#### **Relativity's AI Bootcamp: Powering the Future of Legal**

eMerge Principal [Jason Lichter](#) gave the welcome and closing remarks as the anchor of Relativity's AI Bootcamp: Powering the Future of Legal. The program brought together practitioners and thought leaders at the forefront of technological innovation to discuss the evaluation and adoption of cutting-edge AI technologies.

### **RELATED INDUSTRIES + PRACTICES**

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- [eDiscovery + Data Management](#)