

eMerge: Latest News and Developments – March 2026

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Our eMerge team is excited to share the following updates:

- **Data Retention Benchmarking Survey:** Please take a minute to complete the survey.
- **Case Study:** Fast, Focused, Defensible: AI-Powered Review for an Urgent NDA Inquiry.
- **Spotlight:** From Chaos to Control: Key Pillars of Collaboration Site Data Governance.
- **Awards and Recognition:** Finalist for 2026 Legalweek Leaders in Tech Law Awards and Named Best Client-Law Firm Team Finalist at The American Lawyer Industry Awards.
- **Events and Speaking Engagements:** Updates on AI, Microsoft 365, and much more.

Troutman eMerge offers clients integrated legal, technology, and AI-enhanced services to address complex data-driven problems in litigation, transactional and compliance matters, government investigations, and information governance initiatives. eMerge's attorneys have received [numerous accolades](#) from leading industry authorities, including *Chambers USA* and *Legal 500*. Click [here](#) to access eMerge's full library of thought leadership, webinars, and other key resources.

Data Retention Benchmarking Survey

How long is your company retaining emails? Teams chats? Channels? AI prompts? Meeting recordings? EVERYONE wants to know — across industries. We happily share directional trends when advising clients, but we could all benefit from a more data-driven approach to provide better benchmarking. Please take a moment to complete this brief, [two-minute survey](#), and we'll share the anonymized results with you.

Case Study: Fast, Focused, Defensible: AI-Powered Review for an Urgent NDA Inquiry

When a client received allegations of a potential NDA breach, executive leadership needed a defensible assessment within 72 hours. The client sought a clear picture of:

- whether sensitive information had been shared outside the organization,
- which individuals were involved, and
- how serious the exposure might be.

More than 20,000 documents from multiple mailboxes needed to be analyzed in 72 hours, a near-impossible task for manual review.

Solution:

eMerge used attorney-directed AI with a workflow that included:

- de-duplication and email threading,
- targeted search criteria, and
- aiR for Review to prioritize the most likely responsive documents.

Outcome:

Within three days, we reduced a 20,249?document set down to just 131 key documents for detailed review. The team completed the project for under \$15,000, delivering roughly 75% cost savings and accurate results in days instead of weeks.

Spotlight: From Chaos to Control: Key Pillars of Collaboration Site Data Governance

As collaboration platforms become increasingly central to how organizations work, information governance programs must evolve to keep pace. At eMerge, we've structured our recommendations around three core pillars:

- **Retention Management.** Collaboration tools vary widely in their retention and disposition capabilities, with more robust features often limited to higher license tiers. Effective governance means accounting for both messages and files stored within these platforms.
- **Site Administration and Governance.** Centralize site creation, require approvals, and promote intuitive naming conventions. Giving users free rein leads to sprawl, inconsistency, and security gaps.
- **Employee Training and Policy Development.** Everyone needs to know how to use these tools correctly and to recognize that their communications are auditable and discoverable. Update your acceptable use policies to make this explicit.

Principal Jason Lichter, Director of Information Governance Advisory Services Jennifer Knox, and Director of Legal Technology Antonio Avant explored these pillars in our recent webinar. [Click here to watch the recording.](#)

Awards and Recognition

Troutman eMerge Earns ISO 42001 AI Governance Certification

Troutman eMerge is one of the only legal technology and eDiscovery providers — including law firm subsidiaries — to have achieved ISO 42001 certification, the first internationally recognized, auditable framework for responsible AI governance. [Learn more.](#)

Finalist: 2026 Legalweek Leaders in Tech Law Awards

Troutman eMerge was shortlisted in two categories — *E-Discovery Technology and Innovation* and *Best Use of Artificial Intelligence* — while Troutman Pepper Locke earned a nod for *Innovations in Knowledge Management*. The awards, presented by Legaltech News, recognize organizations at the forefront of legal innovation. [Read more.](#)

Finalist: The American Lawyer 2025 Industry Awards — Best Client-Law Firm Team

Troutman eMerge has been recognized for its longstanding collaboration with Zurich North America, delivering

measurable results through legal advocacy, disciplined matter management, and technology-enabled workflows. The award honors client-firm partnerships that translate legal work into real business outcomes. [Read more.](#)

Relativity Honors Troutman eMerge and Antonio Avant for Leadership in AI-Powered Case Strategy

Dual Recognition Underscores Firm's Practical, Results-Focused Use of Generative AI to Enhance Case Strategy and Client Service.

Troutman eMerge and Antonio Avant were recognized by Relativity, a leading legal data intelligence company, for their leadership in leveraging its generative AI-powered case intelligence solution, aiR for Case Strategy. [Learn more.](#)

Events and Speaking Engagements

Annual eDiscovery Updates Webinar

Please join our panel of practicing lawyers as we analyze last year's key discovery decisions and technical innovations and highlight trends for this year. We will discuss the latest developments in privilege protection and preservation when using generative AI tools, practical considerations when balancing legal requirements with rapidly changing AI and other technologies, and the ongoing impact of collaboration and messaging applications. We will also share practical tips from our experience across matters and industries addressing these concerns. Click [here](#) to register.

Practical Guidance for Navigating Generative AI Ethics and Risk

Managing Partner Alison Grounds, Partner David Stauss, Chief Intake and Conflicts Officer Jessica Davis, and Senior Attorney Jennifer Doran explored the ethical use of generative AI in legal practice — covering sanctions and discovery risks, human verification strategies, court declaration requirements, and managing client expectations around AI use. [View the recording.](#)

The Sedona Conference Working Group 6 Annual Meeting

Principal Jim Calvert contributed to “The Evolution of Discovery and Disclosure Laws in Key Jurisdictions Around the World,” examining recent changes shaping global discovery. [Learn more.](#)

Generative AI in Discovery: Where Do We Go From Here?

Principal Jason Lichter will moderate a panel at The Sedona Conference Working Group 1 Midyear Meeting 2026, exploring current and future AI use cases in discovery and whether existing rules and case law provide adequate guidance. [Learn more.](#)

2026 NWA Annual Conference

Managing Partner Alison Grounds and Hydropower Partner Elizabeth McCormick spoke on hydropower innovation and the evolving regulatory landscape. [Read more.](#)

Best Practices for AI Review and Production of Voluminous ESI

Managing Partner Alison Grounds joined panelists from Relativity, Illinois Farm Bureau, and Kelly Law Partners at the IADC 2026 Midyear Meeting to discuss planning and execution strategies for collecting and producing large-

scale ESI from varied data sources. [Read more.](#)

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