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How Troutman Pepper Locke Used Gen AI to Streamline Its Firm Merger Process

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Dan Pulka and Will Gaus were quoted in the May 2, 2025 *Law.com* article, "[How Troutman Pepper Locke Used Gen AI to Streamline Its Firm Merger Process](#)."

Dan Pulka, Troutman Pepper Locke's chief business development and marketing officer, told Legaltech News that communications during the previous merger had relied too heavily on email, especially given the disruption to in-person communications caused by the COVID-19 pandemic.

Previously, "we couldn't really put together a system that let people understand what's important and [what] you need to pay attention to, versus what's just informational," he said. "We worked with some sophisticated change management comms people who were pushing us in the direction of creating more of an online experience, and we approached [the innovation] team and said, 'can we incorporate Athena into the tool, and is there a role that generative AI could play in the change management comms process?'"

[Will Gaus](#), the firm's chief knowledge and innovation officer, said that the merger-specific instance of Athena did not require substantial reworking of its underlying AI model, but rather ensuring that it had access to all of the relevant merger information, and that it was producing outputs that would be usable to people who were new to the system.

"Whenever a user would ask a specific question, we'd leverage RAG [retrieval augmented generation] and various other types of information retrieval technology so that ... [it would] give specific answers related to the things that we provided it," he said.

...

"They built an agentic workflow, and it allowed us to automate about 80% of that conversion for the more than 500 more bios to the format that we use on troutman.com," Pulka said. "It didn't eliminate the need for review, but it significantly cut down the work time compared to the 2020 merger."

Gaus and Pulka also expect the use of gen AI in the merger process to influence how the firm uses gen AI in client-facing work. "My competitive intelligence team uses it a lot to help the work that they do around assessing new opportunities with existing and new clients to the firm," Pulka said. "We lean on it for things like thought leadership and content creation."

“It became a really sophisticated tool for us to help manage the overall merger and each of the individual work streams,” Gaus said. “A lot of these larger efforts, typically they’ll end up producing new ideas and new functionality for the firm longer term. Out of a lot of that effort, we started rethinking how we present Athena to people, and we’ve created kind of an extra version of Athena, what we call Athena workspace.”

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