

Introducing eMerge 365: Defensible Governance for Microsoft 365

New services and alerts for legal and compliance teams

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KEY POINTS

- *eMerge 365* is a new series of offerings from Troutman eMerge designed to help legal, compliance, and IT teams manage Microsoft 365 data governance, including Purview best practices and Copilot-generated AI artifacts.
- The *eMerge 365 Alerts* feed tracks Microsoft 365 feature releases, deprecations, and configuration changes with direct eDiscovery, information governance, and AI compliance implications, delivered through the *eMerge 365* website and a monthly advisory.
- *eMerge 365* clients receive legal hold validation services, including review of existing holds for over- and under-inclusion and recommendations to close process and platform gaps.
- The *Purview eDiscovery Program Enablement* package includes a comprehensive evaluation of existing Purview eDiscovery workflows, including recommended adjustments to promote consistency and defensibility.
- The *Copilot Readiness Jumpstart* provides a cross-functional Microsoft 365 Copilot deployment and governance assessment, including guidance on appropriate AI use cases, configuration options, policy updates, and artifact retention.

Microsoft 365 has become the backbone of how organizations communicate, collaborate, and store information, but defensibly leveraging its multifaceted and rapidly evolving compliance capabilities remains a challenge for organizations of all sizes and litigation profiles. Copilot's rapidly accelerating adoption, including the potentially discoverable AI artifacts it generates across the Microsoft 365 ecosystem, has raised the governance stakes. *eMerge 365* was built to help legal, compliance, and IT teams gain a better handle on their Microsoft 365 tenants, turning that complexity into a managed, repeatable program.

EMERGE 365 ALERTS

Stay ahead of platform changes that may impact your eDiscovery, records management, collaboration, and compliance teams. Microsoft 365's roadmap is in a constant state of flux, and those official updates are not provided through a legal lens. The *eMerge 365 Alerts* feed distills the signal from the noise, tracking pertinent feature releases, deprecations, and configuration changes with direct implications for your governance environment. Key things to know:

- Alerts are posted directly to the *eMerge 365 website* on a rolling basis as our attorneys and technologists evaluate pertinent developments.
- Subscribers receive alerts in a monthly *eMerge 365* email advisory, highlighting recent updates and analysis.

- Each alert includes our assessment of potential compliance implications and initial thoughts on implementation considerations.
- Contact us to discuss how any specific change applies to your organization.

Recent Alerts:

- [Automatic data preservation for high-risk users — retain deleted data before a legal hold is in place.](#)
- [Sensitivity label inheritance for Teams meeting artifacts.](#)
- [Exchange priority cleanup — implications for retention and eDiscovery workflows.](#)
- [Intelligent meeting recap available without saving transcript.](#)

[Subscribe](#) to the *eMerge 365* mailing list to receive our monthly advisories.

HOW *EMERGE 365* CAN HELP

LEGAL HOLD VALIDATION

- Thorough review of existing legal holds to identify over- and under-inclusive holds.
- Remediate inconsistencies between in-place holds and active hold notices.
- Address process and platform gaps and streamline workflows.

PURVIEW EDISCOVERY PROGRAM ENABLEMENT

- Evaluate legal- and IT-centric Purview eDiscovery workflows against Microsoft's latest updates.
- Document practical workarounds for common challenges, with actionable playbooks for consistency.
- Support preservation and collection across the full Microsoft 365 ecosystem, including Exchange, SharePoint, Teams, OneDrive, OneNote, and Copilot.
- Integrate with tools such as RelativityOne to reduce manual effort and spoliation risk.

INFORMATION GOVERNANCE AND RECORDS RETENTION REFRESH

- Operationalize records management policies and schedules using Purview's Data Lifecycle Management module.
- Deploy machine learning to classify email, OneDrive, and SharePoint content to reduce over-retention.
- Retire tedious manual tagging mandates and reduce redundant, obsolete, and trivial (ROT) data accumulation.
- Identify opportunities for defensible disposition and train users on proper data hygiene.

COPILOT READINESS JUMPSTART

- Address cross-functional organizational readiness to safely deploy Microsoft 365 Copilot.
- Advise on AI policies, configuration options (including for Teams meetings), and artifact retention.
- Train employees on appropriate Copilot use cases to drive responsible adoption.

CONTACT US

Ready to assess your current Microsoft 365 governance posture or discuss how a recent platform change affects

your organization? Please contact us — we welcome the conversation.

TROUTMAN EMERGE

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 recognition from leading industry authorities, including *Chambers USA* and *Legal 500*. For more information, visit troutmanemerge.com.

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