

## Operational readiness at scale: Key lessons from Troutman Pepper Locke's integration journey

**"We were ready for Day One. We empowered our leaders, rehearsed the unknowns, and operated with complete transparency from start to finish."**

William Gaus, Chief Knowledge Management and Innovation Officer, Troutman Pepper Locke

**When Troutman Pepper and Locke Lord agreed to combine, creating a 1,600-lawyer, 30+ office firm, they envisioned a partnership that would deliver more than just scale and expanded reach. The goal was seamless integration from Day One—where systems functioned, culture aligned, and legal professionals remained focused on clients and collaboration, rather than internal change and operations. Such ambition required planning and alignment beyond typical transitions. It called for a trusted partnership, institutional familiarity, and detailed execution.**

Drawing on experience from its 2020 merger, Troutman Pepper approached the integration with clarity and confidence. The firm's leadership team knew what success looked like and what it would take to get there. Harbor, a long-standing partner with familiarity across Troutman's systems and teams, was engaged early to support the process.

"There was clear recognition from the Troutman Pepper and Locke Lord teams that starting early in planning the integration was critical," said Chris Ryan, Executive Vice

President, Harbor. "The sooner the combined firm was integrated, the faster it would be able to reap the benefits of the merger in the first place."

"Choosing Harbor as our partner was straightforward," said William Gaus, Chief Knowledge Management and Innovation Officer. "Both legacy firms had deep experience working with Harbor, including through prior mergers, and we knew firsthand that they delivered. They understood our systems, our people, and our expectations so we could move fast and confidently."

### **Leadership alignment, structured autonomy**

One of the first steps Troutman and Harbor took was to establish an Integration Management Office (IMO)—a governance structure designed to coordinate strategy, drive accountability, and maintain cross-functional visibility throughout the merger. The IMO was more than a project management tool; it was a leadership framework that enabled autonomy while ensuring alignment.

Chiefs, managing directors, and workstream leads from both legacy firms were brought together to shape priorities, identify dependencies, and execute integration plans.



Harbor helped develop the IMO by designing the structure and facilitating its operation, partnering closely with firm leaders, including representatives of HR, legal, talent, IT, and finance, among others.

"The IMO gave structure to our unified, collaborative, and transparent approach," said Gaus. "People understood the plan, the dependencies, and their responsibilities. That alignment made us more effective."

Weekly steering meetings created space for open dialogue, surfacing risks early and keeping teams focused on shared goals. Harbor provided dashboards and milestone tracking, but departments operated within their own cadence and tools, reflecting Troutman's commitment to informed autonomy.

"Each of the chiefs was empowered to lead," Gaus explained. "We trusted their judgment and their teams. They were closest to the work and accountable for the outcomes. That confidence in our leaders built trust and purpose across the organization."

With more than a dozen major workstreams running in parallel, the IMO served as the connective tissue, aligning technology, training, communications, process changes, and strategy with execution.

## Rehearsing success: Dry Run simulation

As the merger date approached, Troutman made a strategic decision to conduct a simulation at scale of the go-live experience. The Dry Run, coordinated with Harbor's support, was designed to replace assumption with certainty and give teams a chance to rehearse success before it counted.

More than 65 stakeholders participated across both legacy firms, including system owners, department leads, and support staff. The exercise unfolded in two phases, tabletop readouts and live technical walkthroughs, and across three major cities.

"The precision and scale of the Dry Run simulation made it unique," said Jaime Woltjen, Senior Director, Strategy + Transformation, Harbor. "It was an exciting exercise that showed once again just how committed firm leadership was to transparency and communication."

In phase one, workstream leaders walked through day-one scenarios, identifying visible end-user changes, surfacing risks, and clarifying how success would be measured. Harbor helped prompt teams to define dependencies, communication plans, training gaps, and escalation paths.

Phase two involved walking through go-live runbooks and, where possible, demoing end-user experiences across key platforms: Aderant for finance, Workday for HR, iManage for document management, Intapp Time for timekeeping, and Microsoft Teams and Exchange for collaboration. Special attention was paid to overlapping legacy systems, blackout periods, and the sequencing of user migrations.

"Instead of assuming it would all work on December 31, we took a 'train the way you fight' approach," said Gaus. "Let's run it for real. Let's remove the mystery."

This structured approach uncovered over 40 action items that might have otherwise gone unnoticed. In some cases, training materials were adjusted. In others, handoffs between departments were clarified. The simulation also served to reinforce behavioural readiness, as staff left the exercise more confident, with clearer expectations.

"You could feel the shift," Gaus said. "People came into January more prepared and more aligned on expectations. Teamwork and trust like that don't emerge easily, but our teams earned it."

The Dry Run wasn't a one-off. Teams began thinking beyond their silos, anticipating ripple effects, and asking deeper questions following the exercise.

## Getting back to business, fast

When January arrived, Troutman Pepper Locke launched as planned. Core systems transitioned smoothly. The firm's new branding went live alongside its operational backbone. A microsite and a combination-focused version of Athena, Troutman's proprietary generative AI tool, supported firmwide communications and policy access. Support structures quickly shifted into business-as-usual.

"From day one, it was clear that the teams had come together as one and were hitting the ground running with a strong affinity for Troutman Pepper Locke," Ryan said. "That unity and readiness have helped the firm to move faster, allowing both lawyers and business professionals to focus on delivering value to clients."

The daily stand-up meetings, intended as a structured response mechanism during the first phase of integration, were discontinued within two weeks. "They evolved into routine touchpoints," Gaus said. "The teams' preparation was exceptional, and because of that, there was very little that required attention. That rapid return to normalcy allowed teams to refocus almost immediately on client delivery and strategic initiatives."



"We were able to transition people back to business as usual quickly," Gaus added. "That accelerated our ability to operate as one firm—and that was always the objective."

"In this profession, the absence of noise carries weight. Challenges make themselves heard quickly. The quiet that followed January 1 confirmed the strength of our execution, and the support we received from partners and firm leadership made that confirmation unmistakable."

### Strategic takeaways: Building M&A integration that works

Troutman Pepper's merger with Locke Lord provides a blueprint for successful M&A integration, especially in the professional services sector. Key takeaways include:

**Start early:** Deep planning and early collaboration create momentum and reduce risk.

**Build strong governance:** The IMO established a structure, coordination, and accountability, while empowering leaders to lead effectively.

**Rehearse realistically:** The Dry Run surfaced hidden gaps, built confidence, and made go-live feel familiar.

**Encourage ownership:** Chiefs and directors owned and were accountable for their workstreams end-to-end, driving execution and building pride.

**Communicate transparently:** Weekly touchpoints, shared documentation, and visible dashboards ensured that everyone was part of the solution.

### Partnering with Harbor

Harbor's ability to support strategy, delivery, and culture provided Troutman with the scaffolding to execute confidently. The team was more than an external advisor. They were a stabilizing force and a partner for execution.

"Harbor doesn't come in with rigid playbooks," Gaus concluded. "They understand this is about people and process, not just platforms. They gave us the foundation to focus on what matters."

By early January, Troutman Pepper Locke had completed its public launch, established unified internal systems, and returned to a stable operating rhythm without significant disruption or distraction. For firm leadership, that outcome was the best endorsement of all.



"The IMO brought structure but it also allowed our teams to focus on the work that mattered most. With Harbor handling the coordination, workstreams could execute without concern for friction or duplication."

William Gaus, Chief Knowledge Management and Innovation Officer, Troutman Pepper Locke



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Troutman Pepper Locke is a full-service law firm of over 1,600 attorneys across 30+ offices, dedicated to solving complex legal challenges with innovation, collaboration, and a client-first mindset.