

Navigating Legal Tech Disruption and Driving Growth

Research Paper ↗

EXECUTIVE SUMMARY

Repositioning for Growth in an AI-Disrupted Legal Ecosystem

Epiq sits at a critical inflection point. Legal services are being rapidly redefined by AI, expanding data volumes, rising regulatory expectations, and a spike in class action activity. While peer companies—Relativity, DISCO, Consilio, KLDiscovery—are reshaping their narratives around AI innovation and vertical-focused GTM motions, Epiq's service breadth and recent AI investments offer a solid foundation for breakout growth. The strategic lever? Reframing go-to-market (GTM) from broad messaging to targeted differentiation.

Market Trends Creating Urgency

1. eDiscovery Market: Growing from \$16.9B to \$25.1B by 2029 (8.3% CAGR); software spend outpacing manual services.
2. AI Adoption: 37% of professionals already use AI in eDiscovery; peer platforms deliver 80%+ automation with strong GTM packaging.
3. Regulatory Complexity: Cross-border data privacy, chat preservation, and breach risk require secure, localized, and compliant delivery.
4. Class Actions: One of the fastest-growing legal spend categories—demanding scale, fairness, and defensibility in claims processing.

GTM Recommendations for Strategic Advantage

1. Lead With Innovation
 - Position Epiq AI Discovery Assistant as a category-defining platform with outcome data and success stories.
2. Segment the Message, Deepen the Conversation
 - Deploy ABM-style campaigns by vertical (e.g. FS, healthcare) and role (GC, Legal Ops).
3. Double Down on Trust & Ethics
 - Promote security certifications, localized infrastructure, and Epiq's Responsible AI framework.
4. Clarify the Full Lifecycle Value
 - Communicate "One Epiq" across eDiscovery, class action, legal ops, and post-matter advisory.

Final Thought

To compete more effectively, accelerate growth, and strengthen its market leadership, Epiq should activate a refreshed go-to-market strategy—one that elevates its core strengths while directly aligning with the evolving priorities of its clients.

Introduction

Epiq Global faces a rapidly evolving legal technology landscape defined by surging data volumes, generative AI breakthroughs, and shifting regulatory demands. These trends pose **risks** – from new competitors leveraging AI to heightened compliance pressures – but also create **growth opportunities** for Epiq to innovate and lead. Currently, top competitors like Relativity, DISCO, KLDISCOVERY, and Consilio are aggressively investing in AI-powered eDiscovery platforms, thought leadership content, and tailored go-to-market strategies. Epiq's broad service portfolio and recent AI initiatives provide a strong foundation, yet there are strategic gaps in its go-to-market messaging and competitive narrative. By sharpening its technology leadership story, personalizing outreach to key client segments (via ABM), and doubling down on trust (security, ethical AI) in its brand, Epiq can better capitalize on industry growth (eDiscovery market **\$25B+ by 2029**^[1]) and reinforce its leadership position. The following brief analyzes industry trends and competitor moves, then outlines strategic recommendations for Epiq's go-to-market approach.

Industry Trends: Tailwinds and Emerging Risks for Epiq

AI Acceleration in Legal Tech

Advances in artificial intelligence – especially **Generative AI** – are transforming legal workflows. In eDiscovery and document review, AI can automatically classify documents, summarize evidence, and even draft privilege logs. Notably, **37% of eDiscovery professionals are already using AI** and most are confident it enhances review accuracy^[2]. Epiq must quickly adopt and market AI solutions or risk losing ground to tech-centric rivals.

Conversely, AI offers a huge **efficiency opportunity**: Epiq's new AI Discovery Assistant reportedly automates >80% of review tasks and completes reviews *up to 90% faster* than traditional methods^[3] – a value proposition that can attract clients seeking speed and cost savings. The key risk is **falling behind** if Epiq's AI capabilities lag. The opportunity is to leverage AI to scale services, reduce manual workloads, and offer innovative solutions (e.g. AI-driven investigations, contract analysis) that differentiate Epiq.

Expanding eDiscovery Market

The eDiscovery market is on a robust growth trajectory, expanding ~8%+ annually^[4]. Global spending is forecast to rise from **\$16.9B in 2024 to \$25.1B by 2029**^[1] (see **Figure 1**). This growth is fueled by **exploding data volumes, new data types (chat, collaboration tools), and stricter regulations** that make discovery more complex^{[5][6]}. For Epiq, a growing market means **more demand** for both technology and services – a clear opportunity. However, the spending mix is shifting: software spend (AI-enabled platforms) is growing faster (9.4% CAGR) than services^[7], and **AI-driven efficiencies are shrinking manual review's share** of budgets (from 64% of spend in 2024 to 52% by 2029)^[8]. This trend poses a **strategic risk** for service-heavy providers: commoditized review work may decline unless augmented by technology.

Epiq will need to **pivot to higher-value services and integrated software offerings** to capture the growing portion of budgets going to AI software and upstream workflow consulting. On the positive side, as data complexity grows, corporate legal teams often lack internal expertise – opening opportunities for Epiq’s **managed services and advisory** to guide clients in deploying advanced eDiscovery tools.

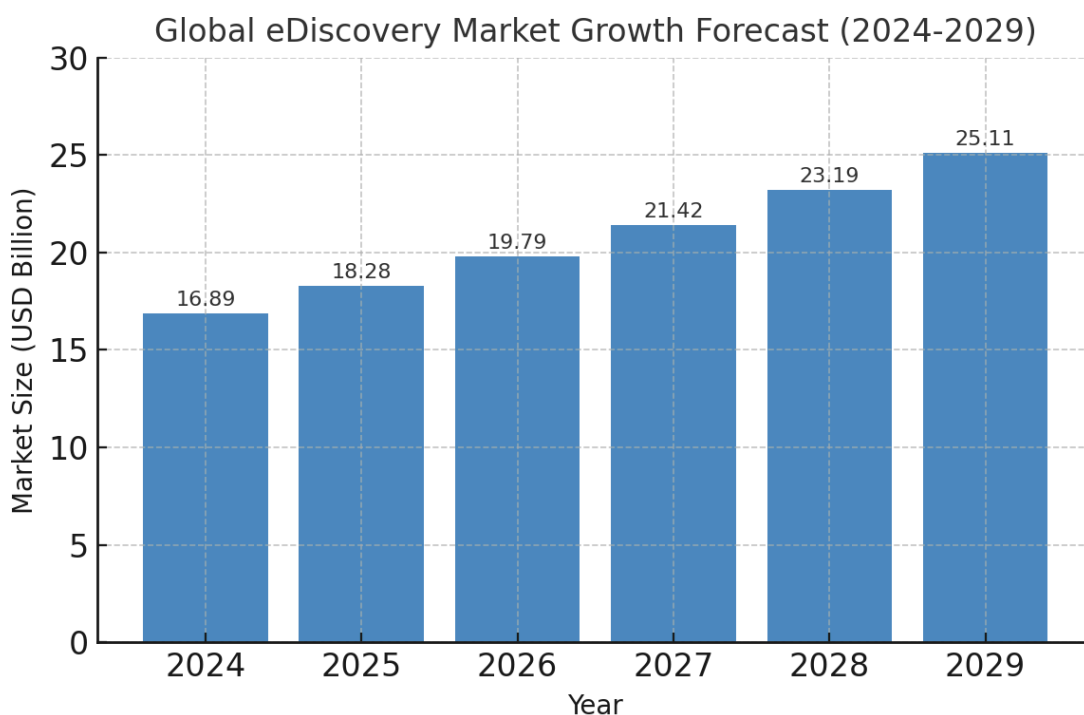


Figure 1: Global eDiscovery Market Growth Forecast (2024–2029). The market is projected to grow from \$16.9B in 2024 to \$25.1B by 2029 (8.3% CAGR), driven by data expansion, AI, and rising compliance needs[1][8].

Regulatory Shifts and Data Compliance

The legal services industry is encountering **heightened regulatory scrutiny** and evolving data privacy laws. Frameworks like the EU’s GDPR and California’s CCPA have introduced strict requirements on data handling, cross-border transfers, and breach notification – all of which complicate eDiscovery and legal data management[9]. Moreover, regulators (and courts) are increasing oversight of discovery practices and information governance. For example, U.S. financial regulators recently penalized firms for failing to preserve chat messages, underscoring that **emerging data sources (Slack, WhatsApp)** must be discoverable and compliant. These shifts represent a **risk** to Epiq if it cannot ensure ironclad data security, privacy compliance, and defensible processes. (Notably, Epiq suffered a ransomware attack in 2020, heightening awareness of cybersecurity.) On the other hand, regulatory complexity is a **growth driver**: organizations need partners with global reach and expertise to navigate privacy laws and discovery obligations. Epiq’s presence in **17+ countries and ISO-certified data centers** can be a selling point[10][11]. By investing in “**localized**” eDiscovery **solutions** (data residency options, multilingual review) and emphasizing its compliance

credentials, Epiq can win clients who face international litigation and privacy challenges[12]. In summary, regulatory change raises the stakes for robust, ethical service delivery – a challenge Epiq must meet to maintain trust, but also a chance to differentiate via superior compliance and security.

Growing Class-Action Activity

Class action and mass tort cases are surging, bringing both more business and more scrutiny. Corporate legal spending on class actions has increased year-over-year, and it remains “one of the fastest-growing areas of legal spend” heading into 2024[13]. More companies are facing class suits than ever, and in-house teams anticipate *unprecedented growth* in their class action dockets[14]. This trend is a clear **opportunity** for Epiq, which is a leading provider of class action administration services. A larger volume of class settlements means more demand for Epiq’s end-to-end capabilities in notice dissemination, claims processing, and settlement distribution. However, alongside growth there is **greater scrutiny of settlement processes** by courts, regulators, and class members. Objectors and regulators are closely watching that class members are notified and paid fairly[15].

This puts pressure on Epiq to execute flawlessly and transparently – any misstep in a high-profile settlement could pose **reputational risk**. To capitalize on the influx of class actions, Epiq should tout its proven track record and technology in handling large, complex settlements (for example, use of digital noticing platforms, fraud detection in claims, etc.), while continuously tightening compliance (adhering to court rules, GDPR when European class members are involved, etc.). If Epiq can align with the **“heightened fairness”** expectations – e.g. by providing advanced reporting to courts and leveraging AI to flag anomalies – it turns a risk into a competitive advantage in the class action arena.

Competitor Strategies and Market Moves

Epiq’s top competitors are actively responding to the same market dynamics with targeted innovations and tactics. A brief analysis of four key competitors – **Relativity, DISCO, KLDISCOVERY, and Consilio** – reveals patterns in how they leverage technology, thought leadership, personalized marketing, and ethical practices:

Competitor	Tech & AI Innovations	Marketing Thought Leadership &	Client Focus and Trust
Relativity (Software provider)	Generative AI integrated into RelativityOne (e.g. Relativity aiR suite) using Azure OpenAI[29][30]; continuous product enhancements	Anchors industry conversation with Relativity Fest conferences; “AI Visionaries” program and frequent blogs/webinars on AI adoption[28].	Segmented solutions for law firms, corporates, government[33][23]. Emphasizes security & compliance (FedRAMP, Azure

Competitor	Tech & AI Innovations	Marketing Thought Leadership &	Client Focus and Trust
	(analytics, automated redactions, etc.).	Invests \$150M+ in R&D yearly, signaling innovation leadership[74].	data residency) – <i>data stays private</i> in its AI features[34]. Strong community support and training resources build user trust.
DISCO (Software + service)	Cloud-native eDiscovery platform with “ Cecilia ” AI (auto review tagging at 36× speed, one-click doc summaries, transcript summarizer)[36][38]. Rapid UI and feature updates.	Positions as an AI thought leader : published guides for litigators vs. in-house on GenAI[22], a 2024 survey report on legal AI[27], and hosts webinars on practical AI use. Visible at major industry events and runs hands-on AI workshops[44]. Marketing tone is modern and educational, often using humor and relatable content.	Focus on enterprise accounts (grew \$100k+ and \$1M+ clients significantly)[41][75] with high-touch sales. Solutions tailored for law firm vs. corporate needs[76]. Builds trust by showcasing results (client stories of faster review) and early adopter testimonials. New leadership emphasizes customer success and an inclusive culture[46], reinforcing a reliable reputation.
KLDiscovery (Services + software)	Nebula all-in-one platform (AI/ML-powered) available SaaS or on-prem[49]. Continuous improvements leading to 20% user growth and 100% revenue growth YoY for Nebula[77][53]. Also offers	Relies on product success stories in press (publishing Nebula growth metrics to build credibility)[53]. Launched Nebula Innovation Academy to train and certify users[55][56] – a form of thought	Broad industry coverage ; website speaks to sectors (finance, pharma, etc.)[59] and specific use cases. Maintains global presence (25+ offices) for local support[10]. Highlights defensibility &

Competitor	Tech & AI Innovations	Marketing Thought Leadership &	Client Focus and Trust
	traditional services (forensics, data recovery).	leadership through education. Contributes to eDiscovery blogs and participates in industry guides (e.g. EDRM buyer's guide).	security (ISO 27001 centers)[11]. Ethos: “customer empowerment” – training users to be proficient, implying openness and partnership.
Consilio (Services + software)	Complete AI suite added to Consilio's platform (gen AI for review, investigations, etc.)[61]. Developed Native AI Review (private cloud AI review) to ensure secure AI usage[72]. Ongoing investments in proprietary tools (analytics in Sightline) and fine-tuned local AI models[64].	Thought leadership via Consilio Insights : regular publications on eDiscovery best practices, AI ethics, etc.[68]. Hosts webinars and CLE training (Advanced Learning Institute)[69]. Executives actively engage in industry initiatives on ethical AI and have gotten awards for innovation[73]. Marketing emphasizes experience + innovation (“global leader with cutting-edge tech”).	Very client-centric messaging – “global reach, local expertise.” Offers flexible talent and consulting services alongside tech, targeting general counsels' broader needs. Strong focus on trust : highlights “responsible AI leadership”[63], keeping client data safe (no public cloud for AI)[66]. Also promotes its diversity, pro bono, and data privacy commitments, underscoring an ethical brand image.

This competitive analysis shows a clear trend: **all major players are leveraging AI/automation as a key selling point**, backed by content that educates the market.

They are also tailoring their go-to-market by client type and emphasizing trust (security, ethics) to alleviate concerns around rapid tech adoption. Epiq can take cues from these moves to recalibrate its own strategy.

Steering Epiq's Go-To-Market Toward Strategic Advantage

Epiq offers one of the broadest solution portfolios in the industry – spanning eDiscovery, business process outsourcing, compliance, restructuring, and class action

services[16][17]. This breadth is a strength, but it also presents **go-to-market challenges**.

Currently, Epiq's messaging centers on being a **"leading legal and compliance services platform integrating people, process, and technology"**[18]. While this positioning highlights Epiq's comprehensive capabilities, there is room to sharpen and tailor Epiq's narrative in a few areas:

- **Service Line Positioning:** Epiq could refine distinct messaging for each service line – e.g. emphasizing technology-enabled efficiency in eDiscovery, or unmatched experience in settlement administration – while still conveying the synergy of the whole. Currently, some offerings like *legal operations consulting* and *business transformation* may be under-appreciated in the market due to limited awareness. This is an **unmet potential**: packaging these services with compelling success stories could attract new buyer personas (e.g. legal COOs, CFOs looking for efficiency).
- **Competitive Narrative:** Epiq has an untapped opportunity to decisively differentiate itself from competitors by anchoring its strategic narrative around **unique strengths**. For instance, Epiq administers more class action settlements than most peers – a leadership point that could be leveraged in marketing to highlight trust and experience. Similarly, Epiq's **hybrid approach to AI**, combining proprietary tools (Epiq Discovery, AI Assistant) and partnerships (with Microsoft, Relativity, etc.), could be framed as offering clients "the best of all worlds" – a more flexible approach than pure-play software companies[19][20].

At present, competitors are framing Epiq as primarily a service provider. Epiq's messaging should counter that by showcasing its innovation (e.g. the Cornell-backed AI Labs, patented tools) and success metrics (cases where Epiq's tech saved X% time or Y dollars) to **bolster its credibility as a tech-enabled leader**.

- **Client Segmentation & Personalization:** Epiq serves law firms, corporate legal departments, government agencies, and more, but its go-to-market may not yet be fully segmented to speak to each audience's distinct needs. While the Epiq website has an interactive tool to filter solutions by role (e.g. GC, IT, Paralegal)[21], the overall marketing content could be more tailored.

Competitors are increasingly using **account-based marketing (ABM)** tactics – for example, DISCO produces separate guides for litigators vs. in-house counsel[22], and Relativity's site has dedicated pages per industry[23]. Epiq could identify its top client segments (say, Fortune 500 corporate legal teams and Am Law 100 law firms) and create more personalized content for them: think **white papers on corporate data governance for GCs**, or webinars on eDiscovery cost control for law firm litigation support. By tailoring outreach and demonstrating understanding of each segment's pain points, Epiq can increase engagement and conversion.

- **Visibility & Thought Leadership:** Epiq has valuable thought leadership (blogs like *The Epiq Angle*, expert predictions[25], etc.), but its share of voice in the market conversation could grow. Competitors' executives frequently speak at industry conferences (ILTACON, Legalweek, etc.) and publish data-driven reports (e.g. Consilio's studies on using Gen AI in review[26], DISCO's survey on AI adoption[27]). Epiq's thought leadership might have a **strategic gap** if it's not as visible or provocative. There is untapped potential for Epiq to leverage its data (from the huge volume of matters it handles) to publish unique insights – for example, **an annual “Epiq Litigation Trends Report”** or a **benchmarking study on discovery costs**. Also, initiatives like **Epiq AI Labs** provide a platform for thought leadership; Epiq can increase market impact by publicly sharing AI Lab findings, hosting roundtables with academics, and taking bold stances on issues like AI ethics (similar to Relativity's “AI Visionaries” program highlighting innovators[28]). In short, amplifying Epiq's expert voice will enhance its authority and address any market perception that it lags in innovation (a perception competitors might encourage).

In summary, Epiq's go-to-market strategy would benefit from more **crisp differentiation** and **audience-focused positioning**. The core value Epiq delivers is strong – now it must be communicated in a way that resonates in specific client contexts and stands out against competitors' narratives.

Recommendations: Closing the Gap – GTM and Account-Based Marketing Strategies for Epiq

To better compete, capture growth, and reinforce its leadership, **Epiq should execute a refreshed go-to-market strategy** that highlights its strengths while directly addressing the emerging priorities of clients. Below are specific recommendations:

1. Amplify Epiq's Technology Edge – “Innovate and Educate.” Epiq needs to be perceived not just as a services outsourcer, but as a cutting-edge **legal tech innovator**. Leverage the recent launch of the **Epiq AI Discovery Assistant™** as centerpiece proof that Epiq is embracing AI. Marketing should trumpet the tangible benefits: e.g. “Epiq's AI platform can cut review volumes by >50%, with **500K docs/hour analysis throughput**[78].” Client success stories using the AI Assistant (like Sullivan & Cromwell's quote about significant time saved[79]) should be front-and-center in sales decks and case studies. Additionally, expand **Epiq's thought leadership** around AI: perhaps publish an **Epiq AI Impact Report** sharing metrics from pilot projects (e.g. average cost savings achieved with Epiq AI vs. traditional review). Host webinars or roundtables featuring Epiq's data scientists (from Epiq AI Labs) and academics from Cornell – positioning Epiq as leading the conversation on *responsible AI in legal*. This educational content will build credibility and inbound interest. The goal is to make “Epiq” synonymous with *practical innovation* – countering any notion that only pure tech companies drive innovation. Over time, consider open-sourcing minor AI tools or

contributing to industry standards (as Relativity and others do) to further bolster tech credentials.

2. Sharpen Service Line Positioning and Cross-Sell Synergies – Epiq’s broad portfolio is powerful, but the messaging for each offering could be further **refined and targeted**. Develop clear **value propositions for each major service**: e.g., for **Discovery Services**, emphasize end-to-end support from forensic collection to review, backed by Epiq’s technology and global team – effectively a one-stop shop that can flex up for huge matters (unlike smaller boutique vendors). For **Class Action & Mass Tort**, highlight Epiq’s unparalleled track record (perhaps “#1 class action admin by cases and settlement size”), sophisticated notice methodologies, and regulatory compliance (avoid any settlement pitfalls). For **Business Transformation/Legal Ops**, articulate ROI metrics (e.g. percent cost reduction achieved through Epiq’s contract management improvements).

Package these messages into updated collateral and web pages focused on solving specific client problems. Then, ensure **cross-selling** is woven in: Epiq should train its sales and account teams to present the “**full Epiq**” value. For instance, when talking to a GC about eDiscovery, also mention post-matter services like regulatory remediation or even *Epiq’s flexible legal talent (Epiq Counsel)* to help staff their teams – showcasing Epiq as a holistic partner in *all* legal operations. This approach mirrors how Consilio upsells from eDiscovery into staffing and consulting; Epiq can do the same, given it has adjacent offerings (contracts, compliance, information governance) that competitors might not.

3. Deploy ABM Programs with Personalization by Segment – Embrace an **account-based marketing** approach for high-value targets (Fortune 500 corporate law departments, top law firms, etc.). Epiq’s marketing and sales should collaborate to identify the top 20–30 strategic accounts (or account clusters by industry) where increased penetration is possible. For each, create **custom content and outreach**. Examples: a personalized microsite or PDF briefing (similar to this document) that speaks directly to that organization’s known challenges – e.g. “Epiq Solutions for Global Bank XYZ: Streamlining Investigations and Ensuring Data Compliance” featuring relevant case studies (perhaps anonymized results Epiq achieved for other banks) and specific mentions of how Epiq addresses banking regulations. This level of personalization shows deep understanding and will resonate with decision-makers more than generic brochures. Tactically, one can use LinkedIn ABM ads or targeted email campaigns that use the prospect’s industry terminology.

Epiq should also **segment its thought leadership distribution**: for instance, produce an “**Epiq Financial Services Legal Trends**” article or webinar for clients in that industry, featuring experts who can discuss finance-specific issues (like SEC investigative discovery). Do similar for other key verticals (healthcare, tech). In parallel, segment by **role**: produce content just for *General Counsels* (focused on risk mitigation, cost control) and another for *Litigation Support Managers* (focused on speed, workflow tips). Personalize event invites – e.g. invite top clients to exclusive roundtables with Epiq’s experts or lab team to discuss AI one-on-one. The more tailored the

engagement, the more Epiq will stand out against the spray-and-pray marketing of some competitors.

4. Reinforce Brand Trust and Ethics Narrative – In an era of data breaches and AI uncertainties, Epiq should make **trustworthiness a key pillar** of its brand. This involves two elements: (a) **Operational excellence in security/compliance**, and (b) **Ethical use of AI and data**. Ensure that Epiq’s **security posture** is loudly communicated – e.g. mention relevant certifications (ISO 27001, SOC 2), a 24/7 cybersecurity team, and successful handling of high-stakes matters without incident. If possible, obtain third-party attestations or awards for data security that can be used in marketing. On compliance, highlight capabilities like data localization (Epiq’s data centers in EU/Asia to keep data in-region for GDPR, etc.) and mastery of cross-border eDiscovery (know-how with EU privacy, China state secrets law, etc.), since clients fret about these.

For **AI ethics**, Epiq has already published a “Responsible AI” statement[20] – build on this by describing *concretely* what it means: e.g. Epiq’s AI is always human-supervised (“**Human+AI**” approach[80]), Epiq does not feed client data into public AI without consent, and Epiq’s AI models are rigorously tested to avoid bias or error. Epiq AI Labs could publish guidelines or a whitepaper on **Ethical AI in eDiscovery**, which would position Epiq as a thought leader on this issue (similar to how ILTA published a best practices guide[81]). Additionally, consider joining or forming an **industry coalition on AI ethics** with peers, to show a united commitment to responsible practices – this could garner positive PR. All sales and marketing materials should incorporate “**Trust Signals**” – client testimonials emphasizing Epiq’s reliability, logos of regulatory bodies Epiq has worked with, and language like “defensible, secure, and compliant” repeatedly associated with Epiq solutions. By reinforcing trust at every touchpoint, Epiq can alleviate the risk-aversion that might otherwise lead clients to stick with familiar providers. It turns Epiq’s size and experience into a reassuring differentiator against smaller AI upstarts.

5. Leverage Unique Epiq Strengths – Integration and Scale – Finally, Epiq should lean into what truly differentiates it: the combination of **breadth and global scale** that few can match. Craft a narrative that Epiq is the only partner that can handle the *entire lifecycle* of complex legal events. For example, in a major litigation, Epiq can assist from initial information governance (to prepare data), to discovery and review, through to possible settlement administration and even post-settlement compliance checks – a seamless continuum. This “**One Epiq**” **integrated value** can be very compelling to corporate clients looking to consolidate vendors. Epiq can illustrate this with an anonymized end-to-end case study (perhaps a large multi-district litigation where Epiq did both discovery and settlement, or a big corporate restructuring where Epiq did both court reporting and claims management). Emphasize how this integration saved the client money and avoided handoff errors. In go-to-market, use **visuals (diagrams)** to show Epiq’s full coverage of services around the EDRM model and beyond.

Additionally, tout Epiq’s **global reach** as a boon in an increasingly international legal environment – e.g. “With operations in 19 countries and support in 10+ languages, Epiq handles cross-border matters smoothly[10], unlike vendors who are U.S.-centric.” This is especially relevant as the U.S. share of eDiscovery spending is projected to drop to

65% by 2029 while other regions grow faster[82]. Epiq is well-positioned to capture that international growth if it highlights its local expertise and compliance with local laws. Invest in a few key **growth markets** (say, expand presence in APAC or Middle East where legal markets are opening up) and include those in messaging (such as publishing region-specific content or winning a high-profile client in that region as a proof point). By playing up scale and integration, Epiq differentiates from point-solution competitors (Relativity, DISCO) and even from Consilio/KLD when it comes to areas like class actions or bankruptcy which they have less presence in.

Implementing these moves will require coordinated action across marketing, product, and sales teams, but the payoff is significant. Epiq can reposition itself from being seen as perhaps a “traditional” player to an **innovative, trusted advisor** that clients actively seek out for modern solutions. The market trends – AI, growth, regulatory demands – are in flux, and *perception will shape reality*: by communicating a bold vision and backing it with credible expertise, Epiq can seize the narrative.

Sources: Current industry research and company publications have informed these findings and recommendations. Key references include market growth analyses[1][8], surveys on legal AI adoption[2], competitor press releases and blogs detailing their strategies (e.g. Relativity’s AI product launch[30], DISCO’s year-in-review on AI features[36][22], KLDDiscovery’s Nebula growth announcement[77], Consilio’s Complete AI launch[61][64]), and Epiq’s own announcements about its AI initiatives[3]. These sources are cited throughout the brief to substantiate the analysis and ensure factual accuracy.

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Contact Us

 hello@ignitehq.us

 www.ignitehq.us

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