



Legacy Capital

Legacy Capital needed an efficient way to reach hundreds of buyers on certain projects. By leveraging the Intralinks for Deal Marketing solution, the firm was able to minimize errors and maximize communication with potential buyers.

“It was nice to have the ability to compose emails with the integrated email template. Faster email generation meant more time for other essential tasks.”

- Jesse Liebe, Associate at Legacy Capital

Situation

Founded in 1994, Legacy Capital (www.legacycapital.com) is an investment bank based in New Orleans and serving the middle market. The firm is industry-agnostic, focusing primarily on sell-side M&A. As a small shop, efficient marketing is a key element of a successful process. Team members historically have relied on time-consuming manual processes to communicate with and track responses from potential buyers. In addition, the team wanted a system to target potential buyers more accurately; when team members distributed Executive Summaries, for example, they had no way of seeing if a potential buyer had reviewed the information.

Client Success Story

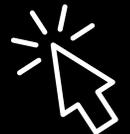
Legacy Capital

Industry:
Investment Banking



1 to 200+

Number of Executive Summaries sent out for a typical deal



70%

Responses to documents sent out



5-7

Number of processes Legacy Capital executes a year

Solution

Preparing to begin a new sale mandate, the Legacy Capital team was looking for a better way to contact potential buyers. The firm's associates were familiar with Intralinks' Virtual Data Rooms, so when they heard about the Intralinks for Deal Marketing solution they were intrigued. They appreciated the ability to automate many tasks, like document distribution and tracking, and were especially drawn to the solution's capability for monitoring potential buyer engagement and feedback.

Result

Intralinks for Deal Marketing helped the Legacy Capital team manage communications and key documents within the centralized Deal Marketing solution. Team members also were able to avoid errors in their communications, as many of the manual tasks in the deal marketing process were eliminated. Marketing was completed in less time, which in addition to saving staff time, reduced the risk of loss of confidentiality for the client.

Benefit

Intralinks for Deal Marketing allowed Legacy Capital to target potential buyers and monitor their interactions with key deal documents. Associates leveraged the communication tracking mechanism to identify the ideal time of day to send out emails and maximize engagement with buyers.