Bulge-Bracket Bank Simplifies NDA Management with SS&C Intralinks Deal Services

While advising a private healthcare client on a sell-side transaction, a multinational bank's advisory team partnered with SS&C Intralinks Deal Services to simplify NDA management, reduce costs and accelerate deal execution.

Situation

The bank's client, a smaller company focused on optimizing costs, wanted to minimize the high legal fees typically associated with executing non-disclosure agreements (NDAs). Traditionally, NDAs were prepared, sent and negotiated by legal teams — a manual process involving 30 to 40 potential buyers and more than 20 NDAs to process. This approach often led to lengthy email exchanges, multiple markup rounds and long hours of reconciliation work by junior analysts.

To streamline NDA management, the bank's advisory team needed a faster, more efficient and cost-effective solution — one that would reduce the strain on internal resources while maintaining accuracy and control.

Client Success Story

Global investment bank and financial services holding company

Industry:

Financial Services

Time savings

Automated tracking and reporting eliminated hours of manual work

Cost efficiency

Reduced reliance on outside counsel, cutting legal expenses significantly

Improved transparency

Real-time updates and reporting gave teams full visibility across NDA execution

Solution

The advisory team turned to Intralinks Deal Services to automate and simplify the process. Intralinks' experts helped handle all redlines and responses from prospective buyers, tracked execution, incorporated comments, and provided daily reports to ensure full transparency and accountability. With centralized tracking and proactive follow-up, the advisory team could easily monitor progress without the need for manual email reconciliation.

Once an NDA was executed, it appeared instantly in the system, giving advisors real-time visibility into deal status. With Intralinks handling the administrative burden, the team could stay focused on higher-value advisory work and keep the deal moving forward.

Results

With Intralinks managing the NDA workflow, the advisory team saved an estimated two hours per day that had previously been spent reconciling emails and updating trackers. The process eliminated late-night administrative work for junior analysts and ensured consistent communication with buyers.

For the client, NDA management was delivered at a fraction of traditional legal costs — all while maintaining the accuracy, speed and responsiveness expected from a top-tier bank's advisory team.

Both the advisor and client described the experience as highly efficient and mutually beneficial, crediting Intralinks' responsiveness, daily reporting and ability to remove administrative burdens as key factors in the project's success.

Benefits

- **Time savings:** Analysts saved at least two hours per day by eliminating manual tracking and late-night reconciliation
- **Cost efficiency:** Leveraging Intralinks Deal Services eliminated the need for costly external counsel fees, which often reach thousands of dollars per engagement
- **Streamlined execution:** Of approximately 22 NDAs processed, only a handful required minor markups, significantly reducing negotiation rounds
- **Real-time visibility:** Signed NDAs were instantly accessible within the Intralinks platform, ensuring full transparency
- **Responsive support:** The Intralinks team was praised for its proactive communication and problem-solving approach
- **Positive impact:** By outsourcing NDA management, the advisory team and their healthcare client gained measurable value and reclaimed time for higher-priority deal activities

"The daily tracker is 100 percent helpful in terms of knowing where things are — it's peace of mind for the junior analysts as well. Outsourcing NDA management to Intralinks saved us as least two hours every day that we'd normally spend reconciling emails and tracking status late at night."

— Investment banking VP, bulge-bracket bank