

CASE STUDY

Global Investment Bank Saves 70 Hours on NDAs with SS&C Intralinks Deal Services

How end-to-end NDA management kept stakeholders aligned through a complex continuation vehicle process.

INDUSTRY

Investment banking

BENEFITS



Time savings

Reduced the junior deal team's administrative workload during the transaction



Lower estimated cost

More predictable and economical alternative to external legal resources



Forward momentum

Followed up on outstanding NDAs within 24 hours



Expanded adoption

A second team at the bank adopted the solution

SITUATION

A global investment bank was advising on a continuation vehicle involving multiple financial advisors and hundreds of counterparties. Limited functionality, a 48-hour outage and unclear pricing from their previous technology provider prompted the deal team to seek a more reliable partner for the next phase of the transaction.

The process required the deal team to coordinate the distribution of non-disclosure agreements (NDAs), negotiation and execution at scale. Multiple advisors and external counsel also required visibility into transaction progress and a clear process for reviewing non-standard terms.

Managing the high volume of document exchanges and communications internally would have placed significant demands on the junior deal team and required extensive coordination. To execute the NDAs within the client's timeline and budget, the team needed a scalable platform with predictable pricing and hands-on support that would allow its bankers to stay focused on the transaction.

SOLUTION

The bank entrusted SS&C Intralinks and its Deal Services team to support the complex, high-stakes process. Prior to distributing the NDAs, Intralinks Deal Services worked with all parties involved in the transaction to define responsibilities, approval thresholds and handoffs. This created a scalable operating model for managing hundreds of NDA conversations in parallel.

Once the process launched, the Intralinks team took full ownership of the entire operational workload across the NDA life cycle, from initial drafts through negotiation and execution. The bank and its counsel retained control over substantive terms without having to coordinate administrative tasks.

Combining VDRPro™, Intralinks' virtual data room, and Deal Services under a single vendor and work order also brought platform and service costs into a more predictable commercial structure.

"The level of transparency and communication was outstanding. We received regular, structured updates that kept both our team and our client fully aligned, eliminating any guesswork and significantly reducing email traffic."

Senior deal team member

RESULT

Intralinks Deal Services took on the operational heavy lifting, saving the bank's junior deal team approximately 70 hours of work. This allowed the bankers to focus on the transaction rather than coordinating routine NDA activity. Deal Services also provided a more predictable and economical alternative to external legal resources, which the bank estimated would have cost approximately USD 30,000–50,000 for NDA management.

Beyond the immediate time and cost savings, Deal Services established a repeatable process for managing complex NDA workflows across large stakeholder groups. Intralinks took on the repetitive

administrative work while ensuring the bank and its counsel retained control over material decisions.

The success of the first engagement led the bank to extend the relationship to a second deal team, which adopted Intralinks NDA Management for a separate transaction. By providing specialized support when needed, Intralinks gave the bank a key strategic advantage: the ability to scale operations while keeping bankers focused on the decisions and relationships that drive deal outcomes. With Intralinks as a trusted partner, the bank can take on increasingly complex transactions while preserving the focus, agility and expertise needed to drive successful outcomes.

"The rapid turnaround kept our transaction timeline on track and ensured we maintained strong momentum during the critical early stages of the deal."

Senior deal team member

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