

# Global Investment Bank Streamlines Sell-Side Preparation with Intralinks Deal Services

Facing a tight timeline with a stretched internal team, a leading global investment bank engaged SS&C Intralinks Deal Services to prepare buyer-ready due diligence documents for its client, saving hours of manual work and keeping the transaction on schedule.

## Situation

During the confirmatory diligence stage of a sell-side transaction, the investment bank was preparing to upload critical documents to the VDR before giving access to potential buyers. The end client had uploaded over one hundred Word documents throughout the detailed VDR structure but did not want to distribute editable files to buyers. As a result, the bank was instructed to review and manually convert each file to PDF format before providing access to the counterparties.

Doing so manually would have required significant administrative effort for the junior bankers in the late stages of the deal. The deal team needed a fast, reliable way to prepare the documents without diverting focus from buyer outreach, diligence coordination and overall deal execution.

## Client Success Story

Leading Global Investment Bank



**Industry:**

Investment Bank and Financial Services



**Time savings**

Eliminated 8-10 hours of manual work during an active transaction



**Reduced admin lift**

Freed the advisory team to focus on deal execution



**Launch-ready VDR**

Files structured and delivered exactly to the client's specifications

## Solution

The deal team engaged SS&C Intralinks Deal Services to manage the entire PDF conversion process, freeing up critical resources for higher value tasks and keeping the deal moving forward. After aligning on scope, timing and pricing, Deal Services immediately got to work.

Throughout the engagement, Intralinks provided full transparency around progress while ensuring files were structured within the VDR precisely to the client's specifications. Ultimately, all 125 documents were converted and delivered within the same business day, exactly as outlined during the initial scoping discussion.

## Results

The data room launched on schedule with fully formatted, buyer-ready documents in place. By partnering with Deal Services, the deal team saved approximately 8-10 hours of manual work during the late stages of the process, reducing its administrative burden and delivering a clean, controlled presentation for prospective buyers.

In high-stakes transactions, routine due diligence tasks can slow momentum. With Intralinks Deal Services, the investment bank offloaded a critical, resource-intensive step to a trusted partner, allowing them to focus on driving the deal to a successful close.

