

CASE STUDY

Simplicity, speed, and innovation help Big Four accounting firm to focus on the deal

About the partnership

The M&A advisory team at a professional services company that provides auditing, advisory and tax services, was recently mandated to work on the sale of a company in the manufacturing molds industry.

Choosing a Virtual Data Room (VDR)

The M&A manager at the firm was tasked to find a virtual data room that is easy to use with the best price to quality but, most importantly, has unparalleled project management services that will help him and his client focus on the deal, not the data room.

During the data room selection process, the M&A manager and his team were amazed by the speed, simplicity, security, innovation and the many unique features that Merrill's new due diligence application, Merrill DatasiteOne, provides.

Why Merrill?

During the deal's first phase, the M&A manager and his team were able to easily upload all the deal folders, subfolders and file structures to Merrill DatasiteOne in one simple drag and drop. They did this without the need for any plug-ins or zip compression while experiencing upload speeds that are eight times faster than the previous solution or any other data room in the market.

The team was also able to easily re-order files in bulk with a similar drag and drop action. When it was time to rename folders and files, the team utilized the "bulk edit" feature that allowed them to rename a vast amount of content in one easy step.

The next task was to set permissions to the different folders, files, roles and groups on the data room. Using Merrill DatasiteOne's new visual permission window, they were able to quickly set up content access security in a few simple clicks while also getting a clear and easily understandable view of the overall security settings.

"WHAT MAKES THE DIFFERENCE BETWEEN AN AVERAGE AND AN AMAZING DATA ROOM PROVIDER LIKE MERRILL DATASITEONE IS THE INNOVATION AND THE ATTENTION TO DETAILS APPLIED TO EVERY FEATURE OF THE DATA ROOM"

-M&A manager at a Big Four accounting firm



Finally, when the data room was launched, the team was keen to analyze the bidders' activity in the data room and the progress of the deal and were thrilled with Merrill DatasiteOne's new capabilities, including the dashboard and visual analytics. These new features helped them to be more efficient in quickly delivering outstanding service and value to their client.

Efficient and simplified Q&A

It was vital to efficiently manage the questions and answers part of the deal and using the integrated Merrill DatasiteOne Q&A feature enabled them to achieve that with a simplified Q&A experience. Their previous Q&A experience with other providers often left them confused and frustrated because of inefficiencies.

The team was also amazed at how simple it was to set up the Q&A feature in Merrill DatasiteOne because of the new and intuitive visual wizard. They discovered how easy it is to create teams, approve workflows, collaborate with colleagues, assign questions in bulk and insert links to files in both questions and answers.

Outstanding security

End-to-end security is always key for any M&A deal and the M&A manager was impressed by the fact that only Merrill DatasiteOne uses encrypted USB keys with a pad by default, meaning clients must enter a password that is sent to them via email to gain access to the USB archived data. This is just one example of how Merrill DatasiteOne provides the highest possible security on the market.

Merrill is there when you need us

When it comes to an M&A closing stage, time is of the essence. On this deal, closing was scheduled with very short notice, leaving the advisory team just 12 hours overnight to obtain the archives. The combination of Merrill's DatasiteOne team and its unparalleled services made it possible to meet the deadline.

"THE ROI ON AN M&A TRANSACTION DELIVERED TO OUR CLIENTS BY MERRILL DATASITEONE IN TERMS OF EFFICIENCY, SPEED AND SERVICE IS IMMENSE."

-M&A manager at a Big Four accounting firm

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