

Houlihan Lokey Streamlines NDA Management and Buyer Outreach with SS&C Intralinks

Houlihan Lokey is a leading global investment bank advising clients on mergers and acquisitions (M&A), capital markets and strategic transactions. Their financial services team provides corporations and funds with end-to-end deal execution, including materials preparation, investor outreach and ongoing advisory throughout the process.

Situation

Houlihan Lokey's financial services team, focused on M&A and strategic advisory, was preparing to support the divestiture of a subsidiary owned by a publicly traded company. As part of the process, they needed to quickly distribute non-disclosure agreements (NDAs) to over 100 potential buyers, including strategic acquirers and private equity firms, before sharing sensitive deal materials – and time was of the essence.

Given the urgency and high volume of document execution, the deal team recognized the need for a scalable, streamlined NDA workflow. In addition to facilitating the transaction, they were responsible for managing buyer engagement, tracking NDA statuses and supporting legal review –making it essential to automate the process without delaying the go-to-market timeline. "Each NDA used to take about an hour of our time. Across a deal with over 100 buyers, it adds up quickly," recalls Houlihan Lokey's James Firpo. "Intralinks gave us those hours back so we could focus on actually running the deal."

Client Success Story

Houlihan Lokey, Inc.

Industry:
Financial Services



Accelerated execution:
100+ NDAs deployed
within hours of setup



Time efficiency:
100+ hours saved
in manual labor



Operational clarity:
On-demand process visibility
eliminated guesswork



"[Intralinks] saved us time, effort and a lot of manual work. The service is easy to use, and the support was exactly what we needed."

– Harris Fermaglich, Houlihan Lokey

Solution

Having successfully used Intralinks VDR support in the past, Houlihan Lokey turned to Intralinks Deal Services to manage the NDA execution for this complex transaction. The Intralinks team quickly implemented a tailored NDA playbook, set up streamlined workflows and launched the process with minimal friction. Within hours of finalizing the playbook, NDAs were already in distribution and the deal had advanced to its next stage.

By simplifying communications and providing clear visibility into the status of each NDA, the process became significantly easier for the analysts and associates leading day-to-day execution. "It was seamless," said Firpo. "We were able to go to market immediately after setup. Everything was handled in one place, and it made our lives significantly easier."

With fewer back-and-forth emails and greater visibility into the status of each agreement, Houlihan Lokey's deal team stayed focused on the transaction, confident that NDA execution was running smoothly in the background.

Result

By leveraging Intralinks Deal Services for NDA support, Houlihan Lokey's deal team gained the structure, speed and simplicity essential for executing a high-volume, time-sensitive M&A process. With intuitive tools, centralized workflows and 24/7 support, they streamlined coordination, reduced manual effort and maintained strong momentum throughout the critical early stages of the deal.

Benefits

- **Significant time savings:** Automated redline reviews, signature collection and status updates freed the team to focus on high-value strategic work rather than administrative tasks.
- **Accelerated time to market:** The process launched within hours of finalizing the NDA playbook, enabling rapid buyer outreach and alignment with the client's aggressive timeline.
- **Clear status visibility:** Ongoing updates provided insight into NDA status, eliminating reliance on manual updates or end-of-day summaries.
- **Reduced communication clutter:** Centralized execution significantly cut down email traffic, helping bankers stay focused on transaction priorities.
- **Proven, repeatable success:** With multiple successful deals supported by Intralinks NDA Services, Houlihan Lokey's team has full confidence in relying on the service for future transactions.