



Making acquisition decisions with surgical precision

Key challenges

Novice sellers. This healthcare company follows a roll-up strategy, so for the seller it's often their first taste of M&A. This makes for some 'interesting' data rooms that need much tidying up by the corporate development team before real progress can be made.

Unclear prognosis. Some deals just won't work – yet the red flags may not appear until the very end. That means big costs in terms of time, money and opportunity. The company's ad-hoc due diligence process makes this risk seemingly unavoidable.

Taking the pulse. Tracking deal progress is a huge task in itself. Multiple workstreams and users make it hard to gauge the health of the deal, or to know what work is complete and which issues are still outstanding.

Key solutions

Buy-side control. Now the company builds a ready-made index into which sellers simply upload their documents. Most are sorted and categorized instantly. AI auto-categorization and translation take care of the rest. It's a huge saving in both time and effort.

Rolling diagnosis. The company can now respond to due diligence findings as they happen. In one example, they learned early on that they were not qualified to service a particular insurance carrier. As a result, they dropped the opportunity without wasting more time.

Vital signs. Built-in analytics give the CEO and CDO the certainty they need. Now they know who has logged in and who hasn't. They can also identify which trackers and findings are open and holding up the deal.

Datasite Acquire™

Who Middle-market company
Industry Healthcare services
Headquarters Southeast, United States
Transaction type Roll-up
Product used Datasite Acquire
Key features Index mapping, findings, and analytics



Our stated goal was to find a sharper, more purpose-built tool for our needs as a buyer and I think we found it.

Financial Planning & Analysis Manager