



## Datasite helps a private equity firm enhance exit readiness and boost process efficiency by 20%

### About the Private Equity Firm

A team of dealmakers at a major private equity firm needed a solution to allow them to collaborate with their bankers and portfolio companies in preparation for an exit.

### Early Exit Readiness is Essential to Best Practices

The firm prides itself on using the extensive experience of its principals as a resource to help grow and meaningfully add value to their businesses. The firm is well-aware of essential best practices in the private equity (PE) investment process—including properly planning and executing the exit. Research underscores the importance of exit excellence to maximize the final return on investment. According to McKinsey, “at the beginning of every deal, best-in-class PE firms have a vision for both the exit route and timing that they continue to refine.”

**Type** Private Equity Investment Firm

**Office** New York

**Sector Coverage** Healthcare, B2B, B2C, Information Technology and Business & Financial Services





## Activating the Live Data Room is Just a Click Away

Using Datasite lets the team sidestep the most time-consuming, labor-intensive processes of preparing an exit. “We can avoid the logistics of handling 25 attachments at a time. Somebody would need to manually go through them, put them somewhere, then later manually move them to a data room. This preparation space supports our internal processes, where we are constantly taking things out and changing things as part of our deal preparation process.”

When the team is ready to proceed, the data room smoothly transitions to be opened to buyers and ready for due diligence. “After we use Datasite for this extended exit preparation period, it quickly and easily converts to a live data room to go live with buyers,” they explained.

Analysts like McKinsey have made it clear that the time to be planning an exit strategy is when an acquisition is first made. Datasite gives the firm the capability it needs for exit readiness, enabling the company to securely share documents with its portfolio company and banker, then open the opportunity up to buyers more efficiently.

    #Wheredealsaremade

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