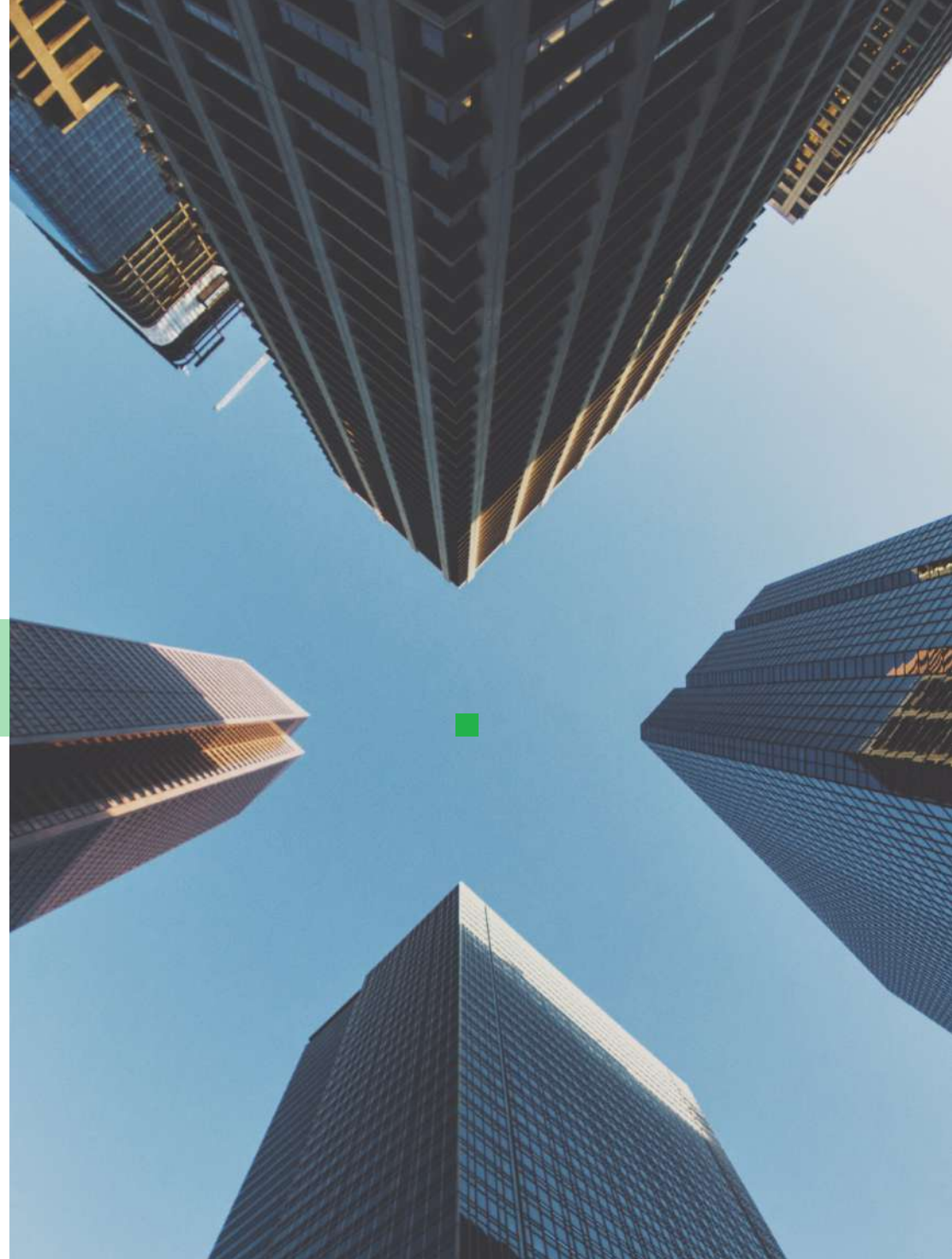




## CASE STUDY

# Nash Advisory exceed client expectations with Ansarada

Meet high-performance deal team Nash Advisory; providing specialised services for sales, acquisitions and business strategy, with the ultimate vision to increase client company value.



# OVERVIEW



## Customer

Nash Advisory  
[nashadvisory.com.au](https://nashadvisory.com.au)



## Industry

Financial services



## Country

Australia

## Going beyond traditional M&A advice

At a boutique advisory firm in Melbourne this week, two new fish were added to the large tank in the office. New pets? No. That's just how Nash Advisory mark the occasion of another transaction successfully closed. Each fish gets a name – typically after the client or as an obscure reference to The Simpsons.

Nash Advisory is a boutique firm that goes far beyond traditional M&A advice.

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They are a high-performance advisory that provide specialised services for sales, acquisitions and business strategy, and serve the \$10-\$100m SME market with the ultimate vision of increasing client company value.

To meet this vision, Nash Advisory worked with Ansarada to implement a solution that would differentiate their client services, reduce information silos and increase collaboration during transactions.

## CHALLENGES

### Turning big ambition into reality

Nash Advisory's increasing client base and ambition for agility, simplicity and scalability were leading to issues such as information loss and silos - primarily as a result of the multiple systems and communication tools they were using.

For prior transactions, Nash had used a number of disparate systems – using service providers like Dropbox to manage documentation, collaborating via email for due diligence and Q&A, and incorporating other internal processes to look after document control and security.

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For smaller firms, the challenges also lie in differentiating client services from larger competitors with greater resources, as well as finding ways to free up time - particularly for senior directors - within a difficult M&A environment, complete with changing timelines and many moving pieces.



## Bringing order to chaos

One of the major challenges Nash faced was how to coordinate and manage many different sources of information. They would generally use 7 different systems to manage a single workflow, including Outlook, Dropbox, Excel, PowerPoint and WhatsApp. Simply maintaining visibility of all the moving pieces and switching between the disparate information streams is a massive undertaking – and that’s just for a single deal. Nash advise on more than ten transactions a year across Australia.

“Transactions involve huge amounts of data being passed between multiple parties, and a large number of questions. Our team was spending a large amount of time organising and managing the transaction process via all the different systems,” said Director, Sean O’Neill.

## Communication excellence

As well as integrating and streamlining these processes, Nash was seeking a way to better serve and communicate with their clients. In a recent deal that involved multiple bidders, reliance on PowerPoint presentations and emails took up significant time and added unnecessary complexity and risk to the process prior to admitting participants into the transaction room. The small firm are huge advocates of stand-up meetings and agile problem solving, and needed a suite of collaboration tools to continue to scale this way of working.

“The problem that is typically faced on a transaction is that generally people are used to doing things in a certain way; so, to ask them to change their behaviours, the case needs to be made that the benefits far outweigh the initial cost from both a time and resources perspective,” said O’Neill.

## ULTIMATE GOAL

# 10x on high performance

By introducing Ansarada’s platform, Nash Advisory was looking to further their standing as a high-performance deal team, capable of scaling their efforts exponentially.

The aim was to achieve a streamlined method of managing data collection, tracking and verification, all the way through to the buyer communication and Q&A process, eliminating friction and maximising performance.

■ **“When the Ansarada team reached out to discuss using the platform for our upcoming transactions, it made perfect sense to provide that continuity of software to not only our staff, but to our clients and buyers, so that the software would be an enabler of the transaction rather than an inhibitor.”**

Sean O’Neill



## SOLUTIONS

# Confidence from day one

The initial implementation process took only 30 minutes before Nash was fully set up, with the platform structure adapted to their templates, and internal teams ready to collaborate on information requests.

“The process was surprisingly simple given how sophisticated the functionality and capabilities of Ansarada are,” said O’Neill. “Thanks to the key team members, it was a quick turnaround for our platform to be up and running. Despite us being a small firm, we found Jesse Read and Joel Gibbs to be extremely responsive and patient with our questions and requests; they were always happy to pick up the phone.”

## Localised, expert support

Going far beyond standard support, the Ansarada Customer Success team are based locally and highly educated in M&A deals and other transactions.

“As an extension of our team, the Ansarada team are available 24/7, are extremely knowledgeable and went above and beyond to assist with helping us to meet our ultimate goal, which was to achieve a fantastic sale result for our client and for the incoming purchaser,” said O’Neill.

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This high level of support is embedded into the platform itself, and provided through a dedicated Customer Success Manager, Jesse Read. This enabled Nash to receive real-time recommendations and support on live transactions. “We viewed Ansarada and the Ansarada team as a new Nash Advisory team member, able to manage multiple work flows and tasks without error,” said O’Neill.

## Automating processes with AI tools

Following the implementation of the platform and integration of their disparate systems, Nash Advisory found they were able to save significant time on what had previously been messy, manual work.

“Consolidating all our communications, data management and document management into one system has saved each of our team members at least an hour a week in management,” said O’Neill, “in addition to the time saved through automated reporting and presentation of bidder engagement data.”

Besides the time saved, Ansarada’s AI tools have set Nash up for success by uncovering insights into their bidders’ motivations and actions, enabling them to make decisions with confidence.

## Simplifying deal collaboration

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Transforming deal collaboration from email, PowerPoint, and Excel to the Ansarada platform allowed for clear and simple Q&A roles during a transaction, streamlining communication and workflow. With three members of the Nash Advisory team generally on each deal, and at least 2 hours of admin saved by the analyst plus 30 minutes per director, that adds up to around 150 hours saved a year.

“With the Q&A process allowing us to all see and track interactions, it has allowed us to focus on value-add tasks rather than administrative things like consolidating communication for clients or internal meetings,” said O’Neill.

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■ **“We are happy to report that the process was seamless, from the initial onboarding of Nash Advisory staff, client teams and buyer communications, through to the finalisation of the transaction and ongoing management of the critical information,”**

**Sean O’Neill**



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# 150 HOURS SAVED PER YEAR

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## LOOKING FORWARD

# Setting the new standard in deal performance

Nash Advisory continues to grow and solidify their presence in the M&A and Private Equity landscape in Australia, keeping innovation at the forefront of their strategy.

“As a young team of professionals, Nash Advisory has led from the front in terms of integrating software and automation into our own business, and taking these learnings into how we look to improve the functions and operations of our client businesses,” said O’Neill.

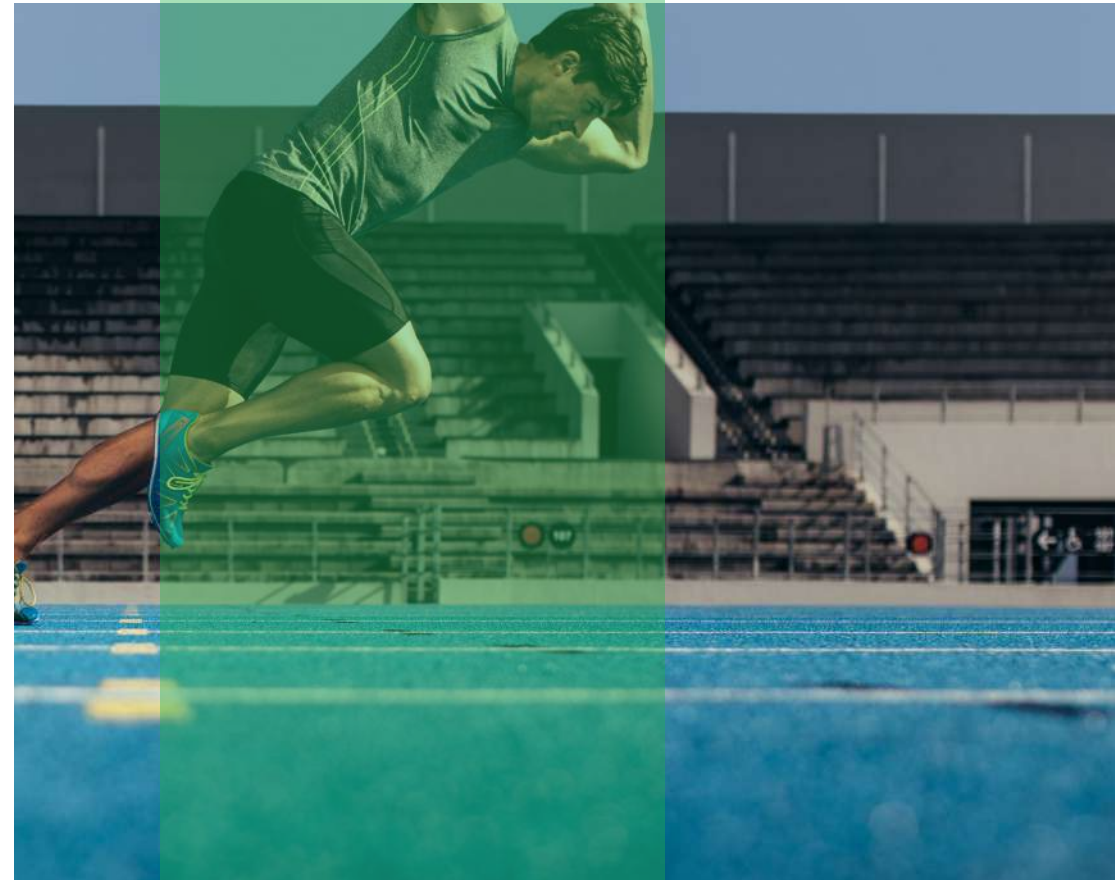
With Ansarada’s platform, they have streamlined and integrated their processes, and freed up time to focus on building their expertise, corporate experience and knowledge of businesses and sectors, so they can elevate their performance tenfold and realise the firm’s potential.

## Transform your firm from legacy to legendary

Working with the Ansarada platform, Nash Advisory is paving the way for the next generation of advisories to reach new levels in high performance dealmaking. Ansarada will only continue to raise their

capacity and potential well above those of their competitors.

We’re excited to see the continued success of Nash as they grow their team and continue to exceed their clients’ expectations. Their success and their advantage with the platform truly make them one to watch.



**To learn more about  
how you can join the  
movement, get in touch  
with us for a demo.**



## Who we are

We are big thinkers, with a big vision for a world where every business, during every critical decision, is always ready to act. It's born out of an absolute belief in companies and the people who found, run and advise them. We are on a mission to achieve this with our SaaS platform and world class team who are based in five main hubs: Sydney, Ho Chi Minh, Chicago, New York and London.

Through supporting companies to execute more than 25,000 critical business transactions since 2005, we've learned what good looks like. Ansarada has leveraged this data and experience to enable companies to get to great sooner and identify ways to improve their operational excellence, and prepare for their most important business transactions. We give companies confidence for those big moments, including capital raises, IPOs, M&A deals and more. We like to remain on the forefront and constantly seek ways to make our clients lives easier which has led to the development of AI and machine learning tools that automate tasks, identify opportunities, and remove unnecessary risk.

Our team is really the core of who we are though and we are proud to have made the list of Australia's Best Places to Work for the last seven years and AFR's Top 100 most innovative companies.

[ansarada.com](https://ansarada.com)

 **ansarada**

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