

# Streamlining M&A: How Mazzone & Associates Elevated Efficiency with Dealcentre AI™

The middle-market investment bank leveraged a faster, more intuitive platform for deal execution by integrating DealCentre AI into their deal process.

## Overview

As a leading advisory firm focused on industrials, Mazzone & Associates operates with precision and scale, representing business owners and private equity groups in complex sell-side transactions. With offices in Atlanta and Chicago, the firm runs everything from initial engagement to final negotiations. Vice President Dustin Dawson has seen the evolution of deal execution tools firsthand, having started with the firm in 2017 when data-sharing often meant patched-together solutions.

For years, Mazzone relied on Intralinks primarily for virtual data rooms (VDRs). But as deal volume and complexity increased, the team recognized the need for better tools that could handle preparation and marketing. After a demo of Dealcentre AI, the firm made the switch. Their goal: to replace legacy workflows with an integrated platform that could save time and reduce friction at every stage of the deal lifecycle.

## Client Success Story

Mazzone & Associates

**Industry:**  
Investment Banking



**Faster deal prep:**  
Self-launch data rooms  
with zero friction, delays or  
third parties



**Automated buyer outreach:**  
Generate and track  
buyer communications



**Time-saving AI redaction:**  
Protect sensitive data and  
allow analysts to focus on  
high-value work



“We saw DealCentre AI as a product that would potentially address some pain points for us — it was a solution that came around right at the perfect time. So, for us, it was a no-brainer.”

— Dustin Dawson, VP, Mazzone & Associates

## Challenges

Prior to adopting Dealcentre AI, the Mazzone team juggled multiple platforms and manual processes. Deal prep was fragmented, with analysts spinning up accounts on various platforms to exchange client documents. Data rooms were only created later in the process to save on costs, which meant teams were scrambling to organize materials just as deals were about to launch.

The marketing and buyer-tracking process presented even greater complexity. Large auction deals involving hundreds of buyers were managed through Excel spreadsheets and relied on hand-generated outreach emails. Dustin's team had to "manually go in and create each one and send them out, which is as tedious as it sounds," he recalls. That fragmentation made it harder to move quickly, respond to clients and capture valuable buyer data for future use.

## Solution

To overcome these hurdles, Mazzone & Associates transitioned to adopting SS&C Intralinks DealCentre AI. Designed as a holistic solution for deal management, DealCentre AI helped the firm address internal and external pain points with features for deal preparation, buyer tracking and marketing.

DealCentre AI, which is powered by the proprietary Ask Link search engine, enabled seamless deal preparation from day one. Mazzone's team could now self-launch data rooms directly within DealCentre AI without third-party involvement, making processes faster and friction-free — even during high-demand moments like holiday weekends.

DealCentre AI's marketing functionalities transformed buyer tracking. The platform automated email generation for initial buyer outreach and provided robust tools for tracking buyer engagement, significantly reducing manual intervention. Sensitive customer data could be managed securely using the integrated AI-powered redaction tool, eliminating the need for external software and saving time.

"The redaction tool has become very helpful for us," he says. "That was something we used to do in Adobe, which would take an analyst three days to go through 100 contracts."

For Mazzone & Associates, DealCentre AI isn't just a platform upgrade — it's a long-term operational advantage. It's their edge in high-stakes dealmaking.

## Result

Mazzone & Associates experienced immediate and measurable improvements after implementing DealCentre AI. Deal preparation became more strategic and less reactive, with data rooms launched at the start of engagements instead of during high-pressure deal phases. Automation features streamlined buyer outreach and tracking, reducing manual work across broad auction processes. "Automating tasks like tracking and email generation during buyer outreach made our processes more efficient than before," says Dawson.

The platform also improved how the team handled sensitive documents — especially through faster, more secure redaction of confidential terms. These efficiencies saved Mazzone hours each week, freeing analysts to focus on higher-value tasks and client service. "The Intralinks team is attentive ... anytime we had feedback, it was addressed immediately," Dustin adds. By consolidating multiple workflows into one platform, DealCentre AI helped Mazzone operate with greater accuracy, speed and confidence, offering a smarter, more scalable approach to managing transactions.

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