

DIGITALISING THE SHAREHOLDER OUTREACH PROCESS FOR CLIENTS

Client

Irish company

Client description

Irish company operating in the clean energy sector

Transaction details

A corporate investment transaction required the delivery of over 1,000 documents to 100+ shareholders across 8 jurisdictions within a short timeline. Traditional mailing methods posed risks of delays and administrative burdens, making it more challenging to meet shorter deadlines while ensuring accurate document execution.

Successful outcome

Our ALG Solutions Technology team, working with the ALG’s Corporate team, designed a digital outreach process integrating advanced e-Signature technology with tailored legal workflows and MI reporting. The solution delivered:

- **Superior Client Experience:** By effectively managing the typical risks associated with large volumes of data across multiple transaction document types, the teams swiftly corrected data discrepancies, leading to more shareholder agreements being finalised on time.
- **Improved Document Execution Risk Management:** We streamlined the clients shareholder outreach process by incorporating conditional logic in document packs, ensuring shareholders received the correct documents based on their transaction preferences.
- **Enhanced Efficiency:** By automating traditionally manual tasks like data entry and document distribution, the teams reduced the administrative burdens and shortened the transaction timeline for the client.

Jurisdictions

- Corporate transaction packs sent to over 170 recipients across 8 worldwide jurisdictions within hours, guaranteeing prompt receipt and execution.

Stakeholders

- Shareholders
- Nominees
- Financial Advisors
- Wealth Managers

Deliverables

- 2,340+ data points digitally inserted across 27 document templates generating 1,530+ documents.
- Shareholder transaction document execution was completed by over 90% of recipients within a 4-week outreach timeframe, substantially exceeding the threshold required for the deal to progress.
- Advanced Client Reporting: Daily progress reports on the receipt, opening, and signing status of shareholder packs enabled targeted reminders to keep transaction deadlines on track and all stakeholders informed of progress.

ALG Solutions key contacts



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Transaction type

A corporate investment and related share transfer, including the incorporation of a new company

Market Recognition



Future of Legal Services Innovation Winner 2024



Chambers 2024 NewLaw only ROI Law firm ranked



The Lawyer European Awards 2024 Best Client Service (ALgorithm 2.0)