

# Driving Efficiency: How SS&C Intralinks Transformed Project Scoping with Zoma



“The estimation process used to be painful and inconsistent. With Zoma, it’s now fast, accurate, and centralized. We use it for all estimation and pricing, and we’ve seen significant improvements in speed, quality, and the ability to drive new business. Everyone loves the technology—and the responsiveness of the Zoma team.”

Daren Glenister

SVP Global Presales and Professional Services



## Overview

As part of SS&C Technologies, Intralinks has a 35-year history of innovative, future-ready, global data-sharing solutions and services that power our clients' success. As a leader in secure collaboration and virtual data rooms, Intralinks provides solutions for financial transactions, mergers and acquisitions, and regulatory compliance. With clients across industries handling sensitive data, Intralinks needed a robust solution to refine their Professional Services processes, particularly in project estimation and SOW creation.

## Challenge

Intralinks faced a **slow and inconsistent** estimation process that caused internal delays and made it difficult to support a fast-moving sales cycle. Estimations often lacked accuracy and required multiple revisions, leading to frustration among team members and a lack of confidence in pricing. Scoping was not standardized, and valuable data was scattered, making it hard to evaluate past projects or forecast effort reliably. The company needed a faster, more accurate, and centralized solution to support business growth and operational efficiency.

## Why did they Select Zoma

Intralinks was looking for a more consistent and efficient way to handle project estimation and pricing. Their existing approach was slow, often inaccurate, and required repeated revisions—delaying deals and creating internal friction. They needed a platform that could standardize scoping methodology, centralize documentation, and improve the overall quality of estimates.

Zoma stood out for its ability to streamline the entire estimation process and adapt quickly to the team’s needs. Its intuitive platform brought immediate improvements in speed, accuracy, and collaboration—giving Intralinks the confidence to use it across all new opportunities. Zoma also impressed with its hands-on support and responsiveness, which made implementation seamless and ensured quick adoption across teams.

## Results

With Zoma, Intralinks transformed a once painful and inconsistent estimation process into a structured, data-driven workflow. The team now relies on Zoma for all project estimation and pricing efforts, enabling faster, more accurate proposals and improving overall sales execution.

By centralizing scoping documentation and maintaining consistency across estimates, Intralinks has seen significant improvements in both the speed and quality of project proposals. Statement of Work (SOW) creation is now 300% faster than before, giving the team a major efficiency boost. The adoption of Zoma not only accelerated turnaround times for the sales team, but also drove stronger alignment between delivery and expectations—helping win more business with the same resources