

## A WORD FROM DFIN

# From complexity to competitive advantage: How to win in a complex deal landscape

Deal activity may be picking up, but speed alone is no longer enough to win. Today's deal teams are operating in an environment defined by tighter timelines, higher data volumes, and increased scrutiny from stakeholders and regulators alike. As a result, technology has become central to how deals are evaluated, executed, and protected, shaping not just efficiency but also confidence, control, and long-term value.

In this Q&A, we sit down with Josh Duncan, senior vice president of product management at DFIN, to explore why deal speed remains elusive despite widespread technology investment. Drawing on his leadership across global capital markets solutions, Josh offers a firsthand perspective on how fragmented systems, evolving governance, and AI's transition from experimentation to core infrastructure are reshaping deal execution, valuation, and risk—and what it takes to turn intelligence into action with confidence and control.

## Why are so many deal teams investing in new technology yet still struggling to move faster?

Most organizations are no longer early in their technology journey; they've moved to the cloud, adopted modern tools, and digitized core processes. The challenge now isn't adoption; it's orchestration. Data still lives across disconnected systems, workflows aren't fully aligned, and governance hasn't kept pace with speed expectations. As a result, teams feel integrated but not "intelligent." In deal environments, that gap shows up as friction, redone work, and slower execution in the moments that matter most.

## How is AI changing the way deals are evaluated, priced, and executed?

AI has crossed the line from experimentation to infrastructure. In dealmaking, that means faster screening, better target identification, and more data-driven diligence



**Josh Duncan** is the senior vice president of product management at DFIN, overseeing software and technology solutions for DFIN's Global Capital Markets Business, including ActiveDisclosure for financial and disclosure reporting

and Venue, the leading virtual data room for M&A and transactions. Josh brings deep expertise in product management, strategic planning, user experience, and product-market alignment, paired with executive-level leadership in finance and AI-driven product strategy, helping translate complex market needs into scalable, customer-centric solutions.

and valuation. AI is shifting M&A from a process driven largely by experience and spreadsheets to one powered by real-time data and predictive insight. The firms that win will be those that can turn intelligence into speed, using AI not just to analyze deals but to move on them with greater confidence.

## How should dealmakers think about technology as a part of valuation and integration planning?

Technology is no longer just an operational consideration—it's a value driver. Buyers are increasingly evaluating the maturity of technology systems, data architecture, and integration readiness when pricing deals and planning postclose execution. Outdated or fragmented technology can introduce risk, delay integration, and require unexpected remediation. Conversely, modern, well-orchestrated platforms signal operational strength and reduce uncertainty, making them a competitive advantage in both M&A and IPO processes.

**Cybersecurity has always been a critical factor in deal outcomes. How have you seen security needs evolve in today's environment?**

Deals today involve more data, more stakeholders, and faster speed than ever before. Financials, contracts, IP, and strategic plans are being shared widely and often under tight deadlines. That creates real risk. Weak controls can slow deals, raise red flags with buyers and regulators, or even impact valuations. Strong cybersecurity and confidentiality controls, on the other hand, protect value. They provide confidence that sensitive information is secure, access is controlled, and activity is auditable, allowing teams to move fast without losing trust.

**Looking forward**

As deal activity accelerates and expectations rise, winning is no longer about moving fast in isolation; it's about moving with purpose, precision, and confidence. In today's complex deal environment, competitive advantage belongs to firms that can unify data, streamline workflows, and embed governance directly into execution. Technology, when thoughtfully orchestrated, becomes more than a support layer—it becomes a strategic force multiplier. By treating intelligence as actionable and security as foundational, deal teams can reduce friction, protect value, and execute with clarity across every stage of the transaction. In a market defined by complexity, the ability to turn insight into decisive action is what ultimately separates winners from the rest.

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*Our mission is simple: to empower clients with the software and support they need to stay ahead of public company filings, investment company filings, private reporting, and beneficial owner reporting, while enhancing workflow efficiency. We bring deep expertise to every engagement, driving transparency and collaboration built on confidence and reliability.*

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