

M&A Friction Check™

Spot the gaps that slow deals and put closings at risk

Quick Friction Check

Due diligence requests and responses live across email, spreadsheets, and the data room, with no single source of truth.

There is confusion over which draft of a deal document is the current version.

Handoffs between practice groups (tax, regulatory, employment, IP) stall the deal waiting on one person.

Key dates and closing milestones are tracked in different places.

The closing checklist lives in one person's head or in scattered files.

Client and counterparty updates happen reactively instead of on a set cadence.

Every deal starts close to scratch, with no repeatable playbook or clearly defined roles.

How to Interpret Your Results

- **0-2 Checks: Normal deal friction.** Minor inefficiencies most deal teams carry. They rarely threaten a transaction, but they quietly add hours and small delays across the matter. Worth tightening before you layer on automation or AI.
- **3-5 Checks: Emerging friction.** Coordination is starting to cost you. Deals run longer than they should, partners spend high-value time chasing status and managing handoffs, and the chance of something slipping through diligence grows with every parallel workstream. **Action needed:** The operational foundation needs work before automation/AI can help.
- **6+ Checks: Structural friction.** The way deal work is designed is now constraining execution. This shows up as longer time to close, re-trade leverage handed to the other side, diligence items caught late, and senior attorneys doing coordination instead of practicing law. **Should be addressed immediately** protect deal outcomes, client confidence, and your capacity to take on more.

Tricia Warren- The Operations Friction Fixer™
If you scored 3 or higher, let's identify where friction is slowing your business and what to fix first. Use the QR code to book a free 30-min Friction Consult ----->

