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# Polsinelli Becomes First Am Law Firm to Adopt Deal Management Platform Project Fortress

**(Dec. 4, 2024)** Polsinelli is pleased to share that it is the first Am Law firm to adopt **Project Fortress**, an innovative deal management platform built on Salesforce and configured specifically for transactional attorneys. Project Fortress empowers clients by providing real-time visibility and transparency into the legal work processes of outside counsel advising on their deals. It streamlines the management of tasks, tracks workstream communications among deal teams and offers comparative analysis of deal points across multiple transactions and agreements over time. With features that highlight milestones, deadlines and status updates, Project Fortress provides measurable insights, enhances team collaboration and enables integrated client teams to build and maintain institutional knowledge about client acquisition processes and business strategies.

As the first adopter of Project Fortress, Polsinelli is redefining the application of legal technology in sophisticated deal work. With over 200 users currently spanning its practice groups and offices across the nation, the firm's attorneys have demonstrated a strong commitment to applying innovative processes that boost operational efficiency and elevate the client service experience.

"With Project Fortress, we are setting a new benchmark for deal work and reaffirming our commitment to being a leader in mergers and acquisitions, real estate, financing and other transactional practice areas. Use of the platform enhances our internal workflows, elevates the client service experience and evidences advancement in our mission to provide top-tier legal services through integrating new and innovative process and technology solutions into how we do our work," said Jonathan K. Henderson, Co-Chair of Polsinelli's Health Care M&A Practice and Chair of Polsinelli's Innovation Department. "The origin of Project Fortress is a testament to this commitment and to having created a firm culture that values leadership and fosters creativity in the practice of law. Project Fortress was developed by our Private Equity M&A Associate Collen Steffen, who drew inspiration from our distinctive approach to advising Polsinelli's private equity and strategic clients in managing serial acquisition strategies. He set out to build a technology platform to address the workflow challenges that deal teams and clients routinely face when managing multiple transactions at one time."

"As an M&A attorney who experienced the deal explosion of 2021, I recognized the need for a platform that could address the challenges of a fast-paced legal practice that has historically been overly reliant on email for transaction management. The vision for Project Fortress, and why the Project Fortress team ultimately decided to build on top of Salesforce, is to make deal teams more efficient by consolidating everything onto a single platform and empowering attorneys to create institutional knowledge on the platform that can be used to better serve the client. We're now seeing that vision come to life at Polsinelli," said Steffen, Founder and President of Project Fortress.

The "engine" at the center of the Fortress platform is Salesforce's Sales Cloud. It has enabled Project Fortress to focus on building powerful legal workflows that better align Polsinelli attorneys with client operations, while providing intuitive access to deal information within a familiar environment. This makes the platform particularly useful for clients as well.

"We are excited to see how Project Fortress will redefine dealmaking, bringing the same level of digital transformation to the legal sector that Salesforce has delivered to a multitude of other industries. This partnership demonstrates how Salesforce's technology can be adapted to meet the specific needs of the legal industry, driving innovation and efficiency in more sophisticated ways," said Blair Montgomery, Regional Manager, SMB at Salesforce

Polsinelli's private equity and portfolio company clients routinely manage a high volume of deals simultaneously and use Project Fortress to monitor the status of legal work as each deal proceeds through the M&A operating model from sourcing to integration. This gives Polsinelli attorneys and clients greater visibility and transparency into the full deal lifecycle. It also promotes true partnership—attorneys are equipped to be more proactive in supporting the implementation of the client's acquisition investment strategy. The integration of other legal tech tools into the Project Fortress platform further simplifies the client experience by making it easier for Polsinelli clients to interact with the data the firm automatically generates in the platform.

Michael Bennett, CEO of Formula Wellness, a leading private equity backed med spa operator and Polsinelli client, says "Project Fortress is our preferred tool in serial buy-side M&A deal management. It helps streamline the execution of our business strategy and keeps us in sync with the legal team, making them an even stronger partner in our growth strategy. As one of the first adopters, we are proud to endorse this innovative platform and its role in our success."

Project Fortress also stands out for its seamless integration with other components of the broader Polsinelli deal-oriented tech stack (including iManage, HighQ and other critical legal technologies) and for filling a large capability gap in legal technology. By consolidating access to these tools into the Fortress hub and offering end-to-end deal management, Project Fortress enables Polsinelli attorneys to manage all aspects of legal work from a single platform. In addition to tasks, closing checklists, agreement precedent, internal channel-based communications and automatically generated deal studies, the Fortress platform also features a proprietary AI framework (Fortress.ai). Fortress.ai allows Polsinelli lawyers to focus on high-value legal work by improving checklist and task management, streamlining communications, summarizing complex legal documents and providing real-time deal data analysis that can drive negotiations as they occur.

For more information on Project Fortress, see [here](#).

## **About Polsinelli**

Polsinelli is an Am Law 100 firm with more than 1,000 attorneys in over 20 offices nationwide. Recognized as one of the top firms for excellent client service and client relationships, Polsinelli is committed to meeting our clients' expectations of what a law firm should be. Our attorneys provide value through practical legal counsel infused with business insight, offering comprehensive corporate, transactional, litigation and regulatory services with a focus on health care, real estate, finance, technology, private equity and life sciences. Polsinelli PC, Polsinelli LLP in California, Polsinelli PC (Inc) in Florida.