



CASE STUDY

Creating a CRM Database to Track Opportunities for a Healthcare Investor



● OBJECTIVE AND SCOPE

The client, a UK-based investor specializing in the healthcare and life sciences sector, was looking to track and profile its potential target companies and partners. It wanted to develop a comprehensive database and sought Benori's support to:

- Review and augment information on existing target companies
- Review and augment information on service providers, including individual industry experts, professional advisors, lenders, LPs, and GPs





● APPROACH

Our approach was to consolidate the contacts and leads lists and categorize them to identify information gaps. We then conducted secondary research through company websites, reports, and third-party databases to track, verify, and augment client data requirements. The collated data was prepared to help track and profile potential partners, suppliers, and competitors.



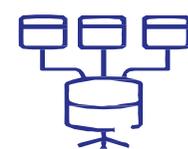
● METHODOLOGY



Secondary
Research



Primary
Research



Data
Modeling



● IMPACT

The research helped the client in:

- Developing a detailed client database and classifying its portfolio to identify sector-relevant clients
- Implementing a one-stop platform to search for any potential company or contact across all service lines





SAMPLE OUTPUT

Companies

DealCloud	Company Name	Type	Sub-Type	Business Description	Owner	Website	City	State/Country	Country	EBITDA (M)	HQ Address	Sub-Sector	Last Company Financial	Last Cr
999993	XYZ LMC Ltd	Capital Provider	Venture Capital	-	-	-	-	-	-	-	-	-	-	-
999994	XYZ LMC Ltd	Operating Company	Private - PE	-	-	-	Stockholm	Stockholm	Sweden	-	-	MedTech	-	-
999995	XYZ LMC Ltd	Capital Provider	Venture Capital	-	-	-	-	Maryland	United States	-	-	-	-	-
999996	XYZ LMC Ltd	Operating Company	Public	-	-	-	Berlin	Brandenburg	Germany	-	-	Advisory and Data	Actual	3/31/2023
999997	XYZ LMC Ltd	Capital Provider	Venture Capital	-	-	-	Manchester	England	United Kingdom	-	-	-	-	-
999998	XYZ LMC Ltd	Operating Company	Private - PE	-	-	-	Valencia	Spain	-	-	-	Providers	-	-
999999	XYZ LMC Ltd	Service Provider	Executive Search Firm	-	-	-	London	England	United Kingdom	-	-	Advisory and Data	-	-
999900	XYZ LMC Ltd	LP	Pension Fund	-	-	-	London	England	United Kingdom	-	-	-	-	-
999901	XYZ LMC Ltd	Service Provider	Business Broker	-	-	-	London	England	United Kingdom	3,500	-	Advisory and Data	Actual	5/8/2023
999902	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	New Providence	New Jersey	United States	-	-	Biopharma	-	-
999903	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Buckinghamshire	England	United Kingdom	-	-	Advisory and Data	-	-
999904	XYZ LMC Ltd	Operating Company	Private - Founder	-	-	-	Boston	Massachusetts	United States	-	-	HealthTech	-	-
999905	XYZ LMC Ltd	Operating Company	Private - Founder	-	-	-	Shanghai	China	-	-	-	Biopharma	-	-
999906	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Ann Arbor	Michigan	United States	-	-	Biopharma	-	-
999907	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Franklin	Tennessee	United States	-	-	HealthTech	-	-
999908	XYZ LMC Ltd	Operating Company	Private - PE	-	-	-	Stockholm	Sweden	-	-	-	Biopharma	-	-
999909	XYZ LMC Ltd	Operating Company	Business Unit	-	-	-	Paris	Île-de-France	France	-	-	Life Science Tools / Diagnostics	-	-
999910	XYZ LMC Ltd	Operating Company	Business Unit	-	-	-	Køge	Denmark	-	-	-	Biopharma	Actual	12/31/2023
999911	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Hanover	Maryland	United States	-	-	MedTech	-	-
999912	XYZ LMC Ltd	Operating Company	Private - PE	-	-	-	Leicestershire	United Kingdom	-	-	-	Providers	-	-
999913	XYZ LMC Ltd	Operating Company	Private - PE	-	-	-	Milan	Lombardy	Italy	-	-	Biopharma	-	-
999914	XYZ LMC Ltd	Operating Company	Business Unit	-	-	-	London	England	United Kingdom	-	-	Advisory and Data	-	-
999915	XYZ LMC Ltd	Capital Provider	Lender - Private Credit	-	-	-	London	England	United Kingdom	-	-	-	Actual	9/30/2022
999916	XYZ LMC Ltd	Operating Company	Private - Founder	-	-	-	Madrid	Spain	-	-	-	MedTech	-	-
999917	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Bivarte	Germany	-	-	-	Biopharma	-	-
999918	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Aliso Viejo	California	United States	-	-	Providers	-	-
999919	XYZ LMC Ltd	Operating Company	Private - PE	-	-	-	Bivarte	Germany	-	-	-	Providers	-	-
999920	XYZ LMC Ltd	Operating Company	Private - Founder	-	-	-	Eury	France	-	-	-	Biopharma	-	-
999921	XYZ LMC Ltd	Operating Company	Private - Founder	-	-	-	Malvern	Pennsylvania	United States	-	-	Biopharma	-	-
999922	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Geneva	Switzerland	-	-	-	Biopharma	-	-
999923	XYZ LMC Ltd	Operating Company	Private - PE	-	-	-	Delft	Netherlands	-	-	-	MedTech	-	-
999924	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Alpharetta	Florida	United States	-	-	Biopharma	-	-
999925	XYZ LMC Ltd	Capital Provider	Private Equity	-	-	-	Aventura	Florida	United States	-	-	-	-	-
999926	XYZ LMC Ltd	Operating Company	Public	-	-	-	Manchester	England	United Kingdom	-	-	Life Science Tools / Diagnostics	Actual	9/30/2023
999927	XYZ LMC Ltd	Operating Company	Private - Other	-	-	-	Union County	New Jersey	United States	-	-	Biopharma	-	-
999928	XYZ LMC Ltd	Capital Provider	Private Equity	-	-	-	Brussels	Brussels-Capital Region	Belgium	-	-	-	-	-
999929	XYZ LMC Ltd	Service Provider	Investment Bank	-	-	-	New York	New York	United States	-	-	Advisory and Data	-	-
999930	XYZ LMC Ltd	Service Provider	Consulting Firm	-	-	-	Doha	United Arab Emirates	-	-	-	Advisory and Data	-	-
999931	XYZ LMC Ltd	Service Provider	Investment Bank	-	-	-	Los Angeles	California	United States	-	-	Advisory and Data	-	-

Service Provider

Sl. No	DealCloud	Full Name	Address	Address Type (Individual/HQ)	Company	Contact Type	Job Title	Email	Bus
121	7867890	XYZ BALMAN	-	Individual Office Address	Health Advances	Consultant	Partner	-	-
122	7867891	XYZ BALMAN	-	Individual Office Address	BC Partners	Private Equity	Partner	-	+44
123	7867891	XYZ BALMAN	-	Individual Office Address	Tentamus Group	Consultant	Board Member	-	-
124	7867891	XYZ BALMAN	-	Individual Office Address	Houlihan Lokey	Investment Banker	Managing Director	-	+1
125	8794821	XYZ BALMAN	-	Individual Office Address	McKinsey & Company	Consultant	Partner	-	+44
126	7867889	XYZ BALMAN	-	Individual Office Address	Mered KGaA	Consultant	Head Global Health, Bioethics and Digital Ethics	-	+49
127	7867889	XYZ BALMAN	-	HQ	AION Labs	Management	Member Board Of Directors	-	-
128	7867889	XYZ BALMAN	-	HQ	HUYA Bioscience International	Management	President, CEO & Executive Chair	-	-
129	7867890	XYZ BALMAN	-	Individual Office Address	Oli	Investment Banker	Director	-	+1
130	7867890	XYZ BALMAN	-	Individual Office Address	NEPC, LLC	Consultant	Senior Investment Director	-	-
131	7867891	XYZ BALMAN	-	Individual Office Address	Risks Partners LLP	Consultant	Founding Partner	-	+44
132	7867891	XYZ BALMAN	-	Individual Office Address	Rothchild	Investment Banker	Partner	-	+44
133	7867892	XYZ BALMAN	-	Individual Office Address	Quintessence	Consultant	Chief Scientific Officer	-	-
134	7867892	XYZ BALMAN	-	Individual Office Address	Morse	Attorney	Senior Attorney	-	+1
135	7867893	XYZ BALMAN	-	Individual Office Address	Rothchild	Investment Banker	Partner	-	+44
136	7867893	XYZ BALMAN	-	Individual Office Address	Rothchild	Investment Banker	Managing Director	-	-
137	7867894	XYZ BALMAN	-	Individual Office Address	Sofinnova Partners	Venture Capital	Partner	-	+44
138	7867894	XYZ BALMAN	-	Individual Office Address	Stirling Pharma Solutions	-	CEO	-	+44

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