

CLIENT WORK / CRM snapshot: 15 October 2026

From targeted investor research to 23 meetings earned.

Research, qualification, personalized outreach support and CRM coordination for a founder-led biotech fundraising campaign.

434

firm entries researched & tracked

923

prospects researched & tracked

210

firms reached through outreach

314

prospects with outreach started

62

CRM-recorded positive replies

23

meetings earned across the campaign

The short version

A research base of 923 prospects across 434 firm entries supported outreach to 314 prospects at 210 firms. The shared campaign recorded 62 positive replies and 23 meetings earned, connecting careful targeting with relevant conversations and coordinated follow-through.

The challenge

AlphaRose Therapeutics needed to identify investors and strategic contacts whose interests could align with its rare-disease therapeutics work. Fit depended on mandate, stage, geography and the individual decision-maker, not just a healthcare label.

The practical challenge was to find relevant people, avoid duplicate approaches and keep promising conversations moving without losing context.

My role and the team

For AlphaRose, I supported prospect research, firm and contact qualification, personalized LinkedIn and email communication, reply handling, CRM maintenance and scheduling handoffs.

I managed the research and outreach workflow while AlphaRose led investor conversations and coordinated meeting invitations. The results reflect that shared campaign.

How the work was organized

Research: check firm mandates, portfolio relevance, current roles and appropriate contact channels. Retain a reason for fit and the source behind it.

Qualification: distinguish therapeutic, AI/data, strategic and network relevance. Prioritize the strongest current fit while recording uncertainties and exclusions.

Communication: prepare concise messages tied to the recipient's work, coordinate LinkedIn and email follow-ups, and retain conversation history.

Route management: identify one active contact route per firm, preserve prior relationships and closed outcomes, and check overlap before approaching another person.

Handoff: move interested replies into coordination with the team, record the owner and next action, and distinguish scheduling, booking and completion.

From research to results

The campaign research base covered 923 prospects across 434 firm entries. Outreach started with 314 prospects at 210 firms, combining targeted contact selection, personalized messages and consistent follow-up.

The shared CRM recorded 62 positive replies and 23 meetings earned. The work connected prospect research with reply handling and meeting coordination, giving the founder a clear next step when interest emerged.

What a client receives from this approach

A researched prospect list with evidence and qualification notes; contact-route and duplicate checks; tailored message drafts and follow-up context; an organized CRM with statuses, owners and next actions; and concise handoff notes for the person taking the meeting.

This approach also supports prospecting for recruitment, training and consulting services, with criteria tailored to each engagement.

Sources & scope

Source: AlphaRose campaign CRM, 15 October 2026. Shared campaign results across outbound and relationship-led routes. Meetings earned counts opportunities across the meeting lifecycle, including those not ultimately held. Outreach started includes connection requests; positive replies follow CRM classifications. Firm totals use recorded labels. Private contact details are omitted.

Discuss a research or outreach project

thisisfurqanahmad@gmail.com | [Read this case study online](#)