

Six months with Convergence Partners.

From Outlook contacts to a network they can put to work.

A Swiss venture capital firm whose most valuable asset, its network, was spread across personal address books. We cleaned it, moved it into one CRM, taught the team to use it, and then put it to work for a funding round.



CLIENT

Convergence Partners
Healthcare venture capital ·
Switzerland

RELATIONSHIP

2024, six months
CRM foundation and outreach

WHAT WE DID

Data first, then outreach
Clean-up, HubSpot, LinkedIn

STARTING POINT

Contacts in Outlook
No overview, deal by deal

TECHNOLOGY

HubSpot, free tier
Website tracking integrated

HEADLINE RESULT

One clean network
Segmented, tracked, in use

THE STARTING POINT

A strong network, and no way to see it.

Convergence Partners invests in founders building high-impact healthcare companies, and helps them scale internationally. For a VC, the network is everything: every funding round depends on bringing the right co-investors to the table.

Yet most of that network lived in several people's Outlook contacts. There was no structured, segmented database and no overview across deals, so each round started almost from scratch. The team had a large LinkedIn network with no view of its quality, and little ongoing engagement with the contacts they already had. Too often, there weren't enough investors lined up for a deal.

| "Who in our network should we call for this round?"

Clean, connect, activate

1

UNDERSTAND

Clean the data before it goes anywhere

We extracted the contacts from several people's Outlook databases and cleaned them up first, deduplicating and structuring them before anything was imported. That was our central advice: moving messy data into a new CRM just gives you a tidier-looking mess.

2

BUILD

One system the whole team can work from

We opened their HubSpot account and implemented it on the free tier, with no paid upgrades, then segmented the contacts into the stakeholder and investor groups the team actually works with. We integrated their website so visits and leads are tracked in the CRM, and trained a co-founder and the team on segmentation and follow-ups, so the system gets used rather than admired.

3

GROW

Putting the network to work

With a clean, segmented network in place, we ran a LinkedIn campaign within their existing connections for a specific funding round across several portfolio startups. It generated interest and opened conversations with potential investors, the kind that simply weren't possible when nobody could see who was in the network.

THE OUTCOMES

1 CRM

Contacts from several Outlook address books, cleaned and segmented in one place

Tracked

Website visits and leads now flow straight into the CRM

CHF 0

In CRM licences: built entirely on HubSpot's free tier



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