

# LEANDATA FOR FINANCIAL TECHNOLOGY

GTM Orchestration Built for FinTech Speed, Accuracy, and Compliance

## The Challenge

FinTech revenue teams operate in one of the most competitive, fast-moving, and tightly regulated B2B environments.

### → COMPLEX BUYING CYCLES

Buyers evaluate multiple vendors simultaneously, enterprise sales cycles span 9 to 18 months, and buying committees pull in compliance, risk, IT, finance, and procurement stakeholders.

### → SIGNAL OVERLOAD

Inquiries arrive from product trials, web forms, AI intent platforms, partner referrals, and digital campaigns – yet they stall in handoff queues, reach the wrong rep, or surface as duplicates that fragment the account record.

### → Operational Gaps

Manual reassignment, fragile spreadsheets, siloed reporting and IT-dependent workflow changes slow speed-to-lead, fracture the buyer journey, and create compliance gaps that an industry governed by SOX, GDPR, and CCPA cannot afford.

### → UNGOVERNED AI SIGNALS

AI tools layered on top of fragmented data generate conflicting signals with no governed layer to reconcile them, creating operational risk and compliance exposure.

# 26%

of B2B FinTech accounts  
churn per year on average

(SerpScupt)

# 32%

close rate for B2B FinTech  
leads contacted within  
5 minutes

(Optifai)

# 60%

of FinTech companies pay  
\$250,000+ in compliance fines  
per year

(Drata)

## The Solution

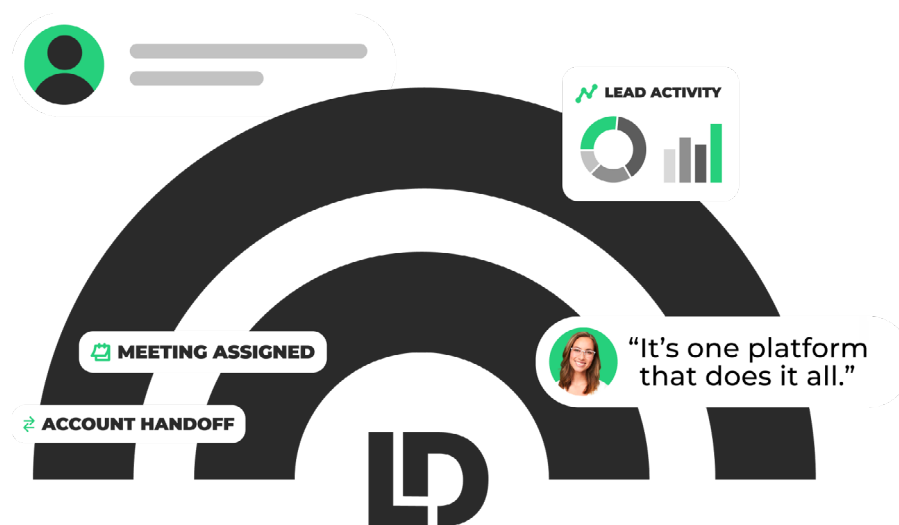
LeanData is the connective tissue across the FinTech GTM motion, automating the routing, assignment, and scheduling revenue teams need to convert faster while staying compliant. Seamlessly integrated with Salesforce and Microsoft Dynamics, LeanData connects every inbound signal, from trial signups and web inquiries to AI agent triggers and partner referrals, to the right rep instantly, with full audit trails and no manual intervention.

FinTech revenue teams use LeanData to:

- **Route and match inquiries** across complex parent/subsidiary structures and regulatory regions without manual reassignment or IT tickets.
- **Accelerate speed-to-lead** in highly competitive markets by triggering instant responses and meeting bookings before buyers evaluate competitors.
- **Coordinate enterprise buying committees** across compliance, risk, IT, finance, and procurement stakeholders from first signal through closed-won.
- **Govern AI-driven signals** with AI governance built in, ensuring every agent-driven signal is matched, routed, and fully auditable – without writing code or filing IT tickets.

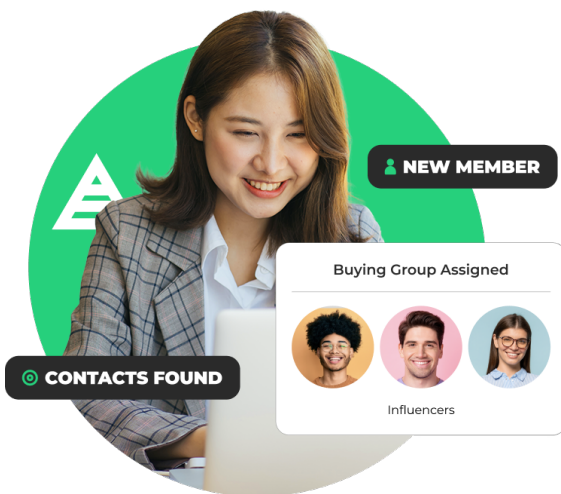
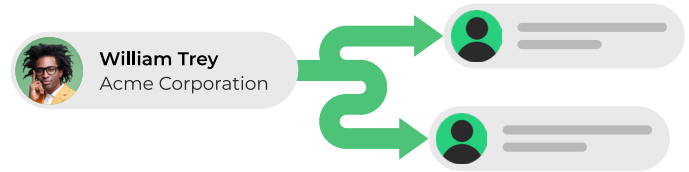
## Route Every Signal to the Right Rep

- Match leads to the right account across parent companies, subsidiaries, and regulatory regions with no manual reassignment.
- Auto-reroute submissions instantly when primary reps are unavailable, with a complete, auditable record of every reassignment.
- Handoff inbound leads from AI agents, intent platforms, product trials, and partner referrals to the right rep with full buyer journey context.



## Accelerate Speed-to-Lead

- Trigger instant responses and meeting bookings to capture high-intent buyers before they evaluate competitors.
- Prioritize high-value submissions automatically based on ICP score, account tier, and product usage signals.
- Eliminate manual handoffs across PLG and sales-led motions to compress cycle times and convert trial users to paid customers faster.



## Coordinate Enterprise Buying Groups

- Map every stakeholder (e.g., compliance, risk, IT, finance, procurement, and RevOps) to the right buying group persona across the sales cycle.
- Scale across complex enterprise account hierarchies through M&A, new product launches, and geographic expansion without IT reconfiguration.
- Auto-dedupe records, link new sign-ups and AI signals to the right corporate accounts, and maintain full audit trails to satisfy SOX, GDPR, and CCPA requirements.

# GET STARTED TODAY

See how LeanData helps insurance carriers route faster, respond smarter, and scale distribution operations without adding headcount or filing IT tickets, or visit us on [Salesforce AppExchange](#).

[REQUEST A DEMO](#)

## Why LeanData?

LeanData is the leading platform for AI GTM Orchestration, sitting at the intersection of AI agents, human sellers, and the systems they share. As the connective tissue across the entire revenue lifecycle, LeanData ensures every signal, whether AI-generated, system-triggered, or human-driven, is routed, actioned, and governed with the same rigor. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to translate GTM strategy into coordinated execution across customer acquisition, adoption, account retention and expansion.