Remote Pro Ai

DOCUMENT

GROWTH TEAM · SECTOR FILE

B2B fintech & finance automation

Sector file · Finance leaders at companies and institutions, opened around licensing, e-invoicing and ERP changes.



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01 SECTOR OVERVIEW

Outbound sales development for B2B fintech and finance-automation providers

New company and institutional opportunities for providers of payments, financing, treasury, invoicing and finance-automation solutions, opened around the deadlines finance leaders already face.

CORE SECTOR FROM OUR SECTOR STUDY · OCTOBER 2026



Finance leaders at companies and institutions, opened around licensing, e-invoicing and ERP changes.

The offer in this sector

20
closing-ready meetings in every delivery month

2
closed deals within 30 days of the first meeting

USD 450
per accepted meeting · nothing upfront in month one

18 of 20
qualify at minimum, else replaced or refunded in cash

What makes this sector hard

Cautious buyers
Finance leaders are cautious and compliance-minded; generic outreach is deleted.

Several stakeholders
Enterprise and institutional buyers need several stakeholders aligned.

Products that need explaining
A demo matters more than a brochure.

A crowded market
Three hundred licensed fintechs calling the same finance departments.

02 WHO WE REACH

Ideal customer profile and decision-makers

Ideal customer profile

Attribute	Requirement
Who	B2B fintechs, payment and invoicing platforms, SME financing and leasing providers, treasury and expense-management vendors, and finance-automation software.
Proof	A proven product, licensed or partnered with a licensee.
Deal value	A minimum deal value, set with you at onboarding, at which a signed contract or a first invoice paid counts as a closed deal; set it where two deals matter to you.
Markets	The United States, metro by metro, in US business hours (Eastern to Pacific).
Out of scope	Buyers that are only banks are out of scope for the guarantee.

Decision-makers we reach

#	Title	Counts toward the guarantee as
01	**CFO / Finance Director**	Budget decision-maker (criterion 1)
02	**Head of Treasury**	Budget decision-maker (criterion 1)
03	**Financial Controller**	Budget decision-maker (criterion 1)
04	**Head of Accounts Payable or Receivable**	Budget decision-maker (criterion 1)
05	**COO**	Budget decision-maker (criterion 1)
06	**CEO / Founder** · in mid-sized companies	Budget decision-maker (criterion 1)
07	**Head of Digital Transformation**	Budget decision-maker (criterion 1)

Before you pay: the free 5-day market check

One questionnaire call, then your ideal customer profile and 50 named target companies with the decision-maker role at each, and a go or no-go review. If the market cannot carry 20 a month, we say so and stop. No cost either way.

A contracted delivery network: a named team of 5 plus a team lead, dedicated to you and led by your dedicated account manager, native-English callers in US business hours.

03 SIGNALS & METHOD

Buying signals and how we work there

Buying signals we track

- New state licences or regulatory filings
- ERP, accounts-payable or treasury system migrations
- A new funding round
- Hiring in finance operations
- Growth in transaction or invoice volume
- Compliance and reporting deadlines

> Signals indicate probable demand, not a guaranteed intention to buy. Figures and client names appear only once a client in this sector approves publication in writing.

How the Growth Engine applies here

1. **Fit session first**
   Banks-only targeting is declined at the fit session, not discovered in Month 2.
2. **The buyer's own deadline**
   The research card gives the SDR the regulatory or ERP context before the call, so the opener names the buyer's own deadline.
3. **Compliance Guard**
   Every message stays within consent and do-not-contact rules, which finance buyers notice.
4. **Scored and approved**
   The Qualification Analyst scores each meeting against the four criteria; your dedicated account manager approves.

Setup takes 14 days, free and outside your month. Every meeting reaches you with its brief, the prospect's e-mail, the recording reference and the scorecard; you accept or object within 2 business days.

Sample opener angle ILLUSTRATIVE, NOT A SCRIPT.

> “With [regulatory phase or ERP change] due by [date], finance teams at companies your size are deciding whether to [manual approach] or automate. We help finance leaders do the second; 20 minutes would show you the numbers for a company like yours.”



The evidence folder per meeting: brief, the prospect's e-mail, recording reference, scorecard.



The 30-day clock for two closed deals starts at the first delivered meeting.

04 CRITERIA & NEXT STEP

How a meeting qualifies, what you can measure

The four written criteria

#	Criterion	In this sector
1	**Budget decision-maker.** The person who can approve the spend attends, or a delegate named in writing; mandate confirmed on the call.	Same in every sector.
2	**Need and timing, recorded.** In the prospect's own words, on a recorded call; the recording reference is attached.	They state, in their own words, the finance process or deadline behind the meeting; the Qualification Analyst scores it and your dedicated account manager approves.
3	**Offer summary received.** Your one-page offer summary, with the agreed price or range, sent and acknowledged before the meeting.	Same in every sector.
4	**Requested in writing.** A formal e-mail from the prospect's company address requesting the meeting to discuss contracting: the evidence.	Same in every sector.

What you can measure

Measure	Value	Basis
Closing-ready meetings per delivery month	**20**	Contract
Qualification floor	**≥ 18 of 20, against the four criteria**	Contract
Closed deals	**2 within 30 days of the first delivered meeting, or we keep working free**	Contract
Your window to accept or object	**2 business days; silence is acceptance**	Contract
Replace before refund	**Replacement within 10 days, else USD 450 in cash within 5 business days**	Contract
Typical sales cycle	**~98 days**	Sector reference · Focus Digital, 3 Jul 2026

> Same offer in every sector: **20 closing-ready meetings in every delivery month** at USD 450 per accepted meeting, and 2 closed deals within 30 days of the first delivered meeting, or we keep working free. Customise from 20 to 60 meetings in steps of 5, same rate. Optional, your choice: we close the deal for you at USD 1,500 per deal closed by us.

Next step: a free 5-day market check for B2B fintech & finance automation

One call, then your ideal customer profile and 50 named target companies, and a go or no-go review. No cost. **«Check my market, free»** · «Read the guarantee on one page»

Remote Pro Ai

FREE · 5 DAYS · NOTHING UPFRONT

A free 5-day market check before you pay anything

You see your ideal customer profile and the 50 named companies we will call before you sign anything.

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