GTM Pilot

SAAS FINTECH - AI INVOICING & OCR PLATFORM
CASE STUDY

Our client is a SaaS Fintech brand deals with invoice automation, connected banking, e-way billing, enterprise payments, and OCR management with AI. It sells a high-consideration product to mid-market and enterprise customers. Sales cycles ranged from 30–90 days, with outbound as a key growth lever.

GTM Pilot helped a B2B SaaS Fintech company replace cold outbound with an engagement-first AI SDR system — generating ₹22 Mn in ARR without adding SDR headcount.

BUSINESS CHALLENGE

Despite having outbound in place, the team faced common SaaS growth bottlenecks:

- Cold outbound reply rates were declining
- SDRs spent excessive time on manual research and follow-ups
- Scaling SDR headcount was expensive and slow
- Pipeline quality was inconsistent — too many low-intent conversations
- Limited budget for paid demand generation

They needed a way to scale outbound without scaling SDRs, while improving conversation quality.

WHY AI SDR (INSTEAD OF MORE SDRS OR MORE TOOLS)

The team decided to test an AI SDR layer that could:

- Research accounts and personas deeply before outreach
- Build familiarity on LinkedIn before pitching
- Automate follow-ups and response handling
- Ensure sales teams only spoke with qualified prospects

This aligned with GTM Pilot's engagement-first outbound approach.

GTM PILOT AISDR–APPROACH

Campaign Duration: 12 Months
Primary Channel: LinkedIn (with structured follow-ups)

- **ICP & Account Targeting:** Defined ICP based on industry, role, & company size. Prioritized prospects with ICP fit titles.
- **AI-Led Prospect Research:** For each prospect, the AI SDR analyzed role and company context, LinkedIn profile tone and recent activity.
- **Engagement Before Outreach:** Instead of immediate pitching AI SDR engaged prospects via: Profile visits, profile follow, post reactions & contextual post comments, followed by connection requests. Familiarity was built organically.

GTM PILOT AI-SDR - APPROACH

- **Contextual Outreach:** Hyper-personalized LinkedIn messages based on, value delivery, Prospect role & engagement history.
- **Intelligent Follow-ups:** AI-driven follow-ups adapted based on Responses, Silence & Interest signals.
- **Response Management & Qualification:** Incoming responses were automatically classified into: SQL, Soft SQL, MQL & Not Interested. Only sales-ready conversations were routed to the sales team.

WHAT MADE THE DIFFERENCE

What impressed the client most was not just volume, but:
- Contextual, interest-driven messages
- Interest mapping & qualification before meetings
- Reduced dependency on manual SDR work
- Predictable outbound motion built for lasting result

Results

- **5,262** LinkedIn connection requests sent
- 47.**8%** connection acceptance rate
- **15,101** messages delivered

Conversion Metrics

- **16.2%** response rate (high-quality, intent-led replies)
- **624** positive responses & **233** meetings booked (SQLs & Soft SQLs)
- **82** prospects converted into customers

₹22 Mn ARR achieved in a year.

KEY TAKEAWAY

The AI SDR didn't increase message volume.

It increased relevance, reduced SDR workload, and delivered predictable pipeline.