

# Building Society Acquisition Intelligence System

An AI-powered market intelligence platform transforming reactive referrals into systematic market penetration for UK building societies.

PROJECT VALUE

**\$83,000**

TIMELINE

**24 Weeks**

EXPECTED ROI

**680%**

# Critical Growth Constraint

## BUSINESS PROBLEM

FinBridge was operating blind to **90% of market opportunities**, missing **£8.7 million** in potential revenue over 18 months.

- **100% referral dependency** for new client acquisition
- **Zero visibility** into building societies evaluating technology
- **Late market awareness** — competitors identified opportunities 6-12 months earlier
- **Unpredictable pipeline** — forecast was "hope for more referrals"

**21.6%**

### Current Market Penetration

Only 47 of 218 UK building societies served

**218**

### UK Building Societies

Total addressable market for BaaS services

**£8.7M**

### Missed Revenue (18 months)

Lost opportunities due to lack of market intelligence

# Missed Opportunities

## Thames Valley Building Society

£1.8M

### LOST OPPORTUNITY

- ✗ Posted CTO role for digital transformation
- ✗ Announced £12M modernization initiative
- ✗ Current provider had major outage

**Result:** Signed with competitor while FinBridge remained unaware

## Northern Counties Mutual

£2.3M

### LOST OPPORTUNITY

- ✗ Current provider had data breach
- ✗ Posted 6 senior technology roles
- ✗ Met with 8 different BaaS providers

**Result:** FinBridge never contacted them

## Peak District Building Society

£1.2M

### LOST OPPORTUNITY

- ✗ Raised £15M for member experience modernization
- ✗ Recruited former Monzo product director
- ✗ Competitor engaged within 3 weeks

**Result:** FinBridge never identified the opportunity

# Market Intelligence Platform

AI-powered platform to systematically monitor, identify, and engage building societies actively seeking BaaS providers across the UK market.

01

## Multi-Source Intelligence

Real-time monitoring of 15+ data sources for buying signals including job postings, Companies House data, and industry news.

02

## AI-Powered Intent Prediction

34 distinct buying signals across 5 strategic categories with ML models predicting vendor evaluation timelines.

03

## Automated Prospect Discovery

Systematic identification of building societies in evaluation phases with contact discovery and CRM integration.

04

## Multi-Channel Outreach

LinkedIn and email campaigns triggered by intent signals with A/B testing and performance analytics.

### Intent Signal Weighting:



Strategic Transformation (30%)



Competitive Pressure (25%)



Growth Activity (20%)



Stress Signals (15%)



Research (10%)

# Technology Stack

## BACKEND

FastAPI • Apache Airflow • Scrapy • Celery • Kafka

## DATA

PostgreSQL 15+ • MongoDB 6.0+ • Elasticsearch 8.0+ • Redis Cluster

## ML / AI

Scikit-learn • XGBoost • TensorFlow • spaCy • BERT

## INTEGRATIONS

HubSpot CRM • LinkedIn API • Companies House • Expandi.io

## INFRA

Google Cloud Platform • Kubernetes • Docker • GitLab CI/CD

## PERFORMANCE TARGETS

Pages Processed Daily **10,000+**

Query Response Time **<500ms**

Data Extraction Success **95%**

## SECURITY & COMPLIANCE

- ✓ End-to-end encryption
- ✓ GDPR compliance
- ✓ SOC 2 Type II ready
- ✓ Ethical data collection

# 24-Week Delivery Roadmap

## PHASE 1

Weeks 1-6

### Foundation

- Cloud infrastructure deployment
- Multi-source scraping framework
- Initial data collection pipeline
- Basic prospect identification

## PHASE 2

Weeks 7-12

### Intelligence Processing

- Advanced signal classification
- ML model development
- Competitive intelligence framework
- Real-time alert system

## PHASE 3

Weeks 13-18

### Campaign Automation

- Multi-channel outreach automation
- HubSpot CRM integration
- Personalization engine
- Campaign analytics

## PHASE 4

Weeks 19-24

### Production Launch

- Executive dashboard development
- Production deployment
- User training
- Performance optimization

# Business Impact

## PIPELINE GENERATION

10x

Increase in prospect pipeline

## RETURN ON INVESTMENT

680%

ROI over 24 months

## REVENUE GROWTH

£6.0M

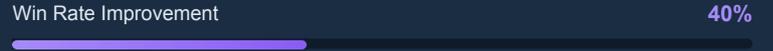
Additional annual recurring revenue

## MARKET POSITION

35%

Target market penetration

## Operational Efficiency Gains



Scalable growth engine independent of referrals

"Transforming *reactive referral dependency* into *systematic market penetration* — enabling 10x pipeline growth and path to £15-20M revenue."

**\$83K**

Project Value

**680%**

24-Month ROI

**6-8**

Week Payback

#### TECHNICAL SKILLS

System Architecture • Machine Learning • NLP • Web Scraping • Data Engineering • API Integration • Cloud (GCP) • Database Design • Real-time Processing • Security & Compliance

#### BUSINESS SKILLS

Requirements Analysis • ROI Modeling • Market Research • Solution Design • Proposal Writing • Project Planning • Risk Management • Client Communication

#### CORE TECHNOLOGIES

Python • FastAPI • TensorFlow • Kafka • PostgreSQL • MongoDB • Elasticsearch • Kubernetes • Docker • HubSpot API



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# Thank You

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