

FIN.TECH MARKETING COMMUNITY ROUNDTABLE PANEL SUMMARY NOTES

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Scaling Smarter: Marketing's Role in Driving Growth, Strategic Value & the AI Advantage

Insights from the Fin.Tech Marketing New York Marketing Leadership Roundtable

In an era defined by accelerating technology, shifting buyer behaviors, and resource constraints, today's marketing leaders face a complex mandate: to do more with less and do it smarter.

At a recent Fin.Tech Marketing roundtable in New York, senior marketing executives gathered to unpack how artificial intelligence, data, and strategic alignment are reshaping the way companies scale. Moderated by Jessica Zall, CMO at Burford Capital, the discussion featured insights from Francine Lecompte Gittins, Principal at DigitallyNimble; Diane Levich, VP of Marketing at HPR; and Colleen Judge, Head of Marketing & Communications at Matrix Applications—bringing together leading thinkers and practitioners from across the fintech marketing ecosystem.

The conversation revealed a unifying theme: scaling smarter means leveraging AI and analytics to amplify human creativity, deepen customer understanding, and drive measurable business value.

Doing More with Less: The Power of Fractional Expertise

Diane Levich, VP, Marketing at HPR, explored the theme of “scaling smarter” from an operational lens, emphasizing the importance of agility and targeted expertise.

“In a world where you must do more with less,” she said, “fill gaps with senior strategists who understand your industry, your customers, and can deliver immediate value.”

According to Levich, fractional or contract marketing leaders offer immediate, senior expertise to fill talent gaps and challenge the status quo, especially in leaner organizations. When paired with AI tools (like ChatGPT and Perplexity), these experts accelerate content creation and streamline workflows, allowing CMOs to focus on high-level strategy.

But there’s a caveat. “We’re not there yet,” said Levich, “AI is not a replacement hire.” For example, experiments with agentic AI to create a survey for a simulated buying group in a niche trading market ultimately failed because the generalized outputs could not capture the nuances of human sentiment.

Her advice for leaders:

- Emphasize tight collaboration across product, sales, and marketing to build cohesive, custom-fit messaging that is hyper-focused on the *WHY*.
- Focus on quality over quantity of content — publish differentiated, high-level work that earns attention and builds a strong brand.
- Use real engagement signals to demonstrate marketing’s impact on leadership, such as tracking key accounts across social and web properties and using annotations in GA4 to understand what causes engagement upticks.
- And above all, “Be adaptable, fail fast, and manage up and cross-org with empathy.”

The Next Frontier: From SEO to AEO (Answer Engine Optimization)

Colleen Judge, Head of Marketing & Communications, Matrix Applications, took the conversation into the emerging frontier of AI discovery — AEO, or *Answer Engine Optimization*. For Colleen, scaling smarter requires a balance of thoughtful experimentation and real-time responsive learning.

“As users shift from Google to AI chatbots like ChatGPT, Gemini, and Perplexity to research brands,” she explained, “we have to ask: *What story is AI telling about us?*”

Colleen encouraged marketers to start evaluating their brand’s visibility in this new landscape, recommending tools like HubSpot’s AEO Grader to assess a company’s brand presence, sentiment, and competitiveness within AI platforms. She also stressed the need to balance optimization for traditional SEO (Google) and the new AEO (AI chatbots) in their web presence.

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Her broader message is that scaling smarter is about thoughtful experimentation and continuous learning.

- Define goals and boundaries before launching new initiatives.
- For financial services, recognize that high-touch initiatives, such as industry events, are critical but difficult to quantify in terms of large numbers. **Track the quality of interactions** (categorizing touchpoints with clients, partners, targets, and competitors) to demonstrate marketing's impact over long sales cycles.
- Capture real-time lessons from each campaign to refine the next.
- Balance digital insights with human experiences.

Marketing as a Value Multiplier: From Awareness to Enterprise Growth

Francine Lecompte Gittins, Principal, DigitallyNimble, closed the session with a clear message: marketing's role in 2025 and beyond is to drive enterprise value.

Drawing on her experience leading marketing at AxiomSL (now Adenza), which grew from \$10M to \$150M in revenue, she defined *scaling smarter* as focusing relentlessly on what moves the needle. “Our CEO once told me, ‘I’m a \$10M company, but I want people to think we’re a \$100M firm.’ That’s the power of marketing perception — but it only works when it’s grounded in truth.”

In her current roles with Avalo and Ionfi, Francine is applying the same philosophy, leveraging targeted ABM, educational content, and strategic partnerships to reach sophisticated, risk-averse buyers like COOs, treasurers, and compliance officers. She shared how her team developed the entire go-to-market strategy for new products and achieved 98% client retention by working closely with product teams.

The proof points she shares with CEOs and boards go far beyond clicks and impressions:

- Customer acquisition cost vs. lifetime value (CAC/LTV)
- Sales velocity and win rates
- Market share growth vs. competition
- M&A valuation impact driven by brand equity

AI is central to this evolution, helping teams analyze engagement patterns, monitor competitors, and generate insights more quickly. Specifically, she noted real business impact in **content intelligence and personalization** (creating 10 highly targeted pieces instead of 50 generic ones) and **competitive intelligence and market monitoring** across complex regions.

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Moreover, brand trust is paramount in B2B fintech, making AI risk management critical. Francine's team ensures brand governance by conducting mandatory human review of all AI-generated content to ensure compliance. They set clear data privacy guardrails and use a framework to define AI's role in drafting versus human-led final, regulatory content. Internal transparency on AI tool usage is also a key protocol.

The Future of Teams: Skills That Scale

As AI automates the routine, marketing leaders agree that success increasingly depends on the human skills machines can't replicate.

The new marketing skill set includes:

- Strategic thinking: connecting business dots beyond the dashboard
- Data fluency: translating analytics into real business decisions
- Curiosity and adaptability: embracing constant tool evolution
- Storytelling and emotional intelligence: crafting messages that inspire trust

The panelists offered a consistent takeaway: Automation should free teams to focus on creative ideation, client relationships, and cross-functional strategy — the areas that truly differentiate brands in crowded markets. Scaling smarter is about direction more than raw speed.