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FIN.TECH MARKETING COMMUNITY ROUNDTABLE NOTES

DATE: 02 July 2026
Location: London, United Kingdom

Executive Summary

On **2 July 2026**, senior marketing, finance, technology and business leaders gathered at the **Fin.Tech Marketing Community Marketing & Business Leadership Roundtable** to explore how organisations can build resilient, scalable businesses in an increasingly data-driven and AI-enabled environment.
Held under **Chatham House Rules**, the discussion encouraged open and candid conversations around commercial accountability, finance and marketing alignment, cloud technology, AI adoption, operational excellence, leadership, and sustainable business growth.
A consistent theme throughout the afternoon was that **growth is no longer driven by marketing, finance, technology or operations independently—but by how effectively these functions work together.** Organisations that create shared visibility, common metrics, and integrated technology are significantly better positioned to respond to market changes, improve customer acquisition, and maximise long-term profitability.
Participants also highlighted that while technology continues to evolve rapidly, **people, culture and leadership remain the true differentiators** for organisations seeking long-term success.

Discussion Themes

1. Marketing and Finance: Creating a Shared Commercial Language

The discussion began by exploring the growing relationship between finance and marketing.

Participants agreed that marketing can no longer be viewed purely as a cost centre. Particularly within high-growth businesses and startups, marketing investment must be directly linked to commercial outcomes and measurable business performance.

Finance leaders increasingly expect marketing teams to demonstrate clear evidence of value through metrics such as:

- Customer Acquisition Cost (CAC)
- Marketing ROI
- Pipeline contribution
- Conversion rates
- Sales cycle performance
- Customer lifetime value
- Revenue attribution

Several attendees noted that investors also expect these commercial metrics to be readily available, making close collaboration between finance and marketing increasingly important.

The group discussed how successful organisations create shared dashboards and common KPIs rather than separate departmental reporting.

2. Agility is Becoming a Competitive Advantage

One of the strongest themes throughout the discussion was organisational agility.
Unlike traditional annual budgeting cycles, many growing businesses now review forecasts monthly, weekly or even daily depending on business performance.
Marketing investment is increasingly adjusted in real time based on:

- Revenue performance
- Cash flow
- Pipeline health
- Market conditions
- Customer demand

Participants agreed that organisations able to rapidly shift budgets and resources gain a significant competitive advantage over businesses operating with rigid planning cycles.

3. Cloud Technology Has Transformed Financial Decision-Making

Cloud platforms have fundamentally changed how finance teams operate.

Participants discussed how cloud-based finance systems now provide:

- Real-time reporting
- Improved visibility
- Better collaboration
- Faster forecasting
- Greater operational transparency

Rather than relying on multiple disconnected spreadsheets, organisations increasingly use integrated finance platforms that create a single source of truth across the business.

The discussion also highlighted how finance teams have historically adopted cloud technologies more cautiously due to concerns around governance, compliance and accountability.

However, participants agreed that today's cloud platforms provide stronger controls while significantly improving efficiency.

4. Moving Beyond Spreadsheets

A recurring discussion focused on the limitations of spreadsheet-driven organisations.

Although spreadsheets remain useful for analysis, they become increasingly difficult to manage as businesses grow.
Challenges identified included:

- Manual data entry
- Version control issues
- Human error
- Limited collaboration
- Knowledge concentrated within individual employees
- Reduced visibility across teams

Integrated cloud platforms help eliminate many of these issues while providing stronger security, automation and audit capabilities.

Participants agreed that replacing manual processes allows finance teams to spend more time analysing data rather than preparing it.

5. Building an Integrated Technology Ecosystem

Rather than implementing isolated software tools, organisations are increasingly investing in connected technology ecosystems.
Participants discussed the importance of integrating:

- CRM platforms
- Finance systems
- Marketing automation
- Business intelligence tools
- Customer data
- Analytics platforms

When these systems are connected, organisations gain significantly deeper insights into customer behaviour, revenue generation and operational performance.

Several participants noted that integration enables leadership teams to make faster, more informed business decisions.

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Artificial Intelligence featured heavily throughout the discussion.

Participants explored how AI is increasingly supporting:

- Financial forecasting
- Revenue prediction
- Pipeline analysis
- Scenario planning
- Operational reporting

AI allows finance teams to identify trends earlier while improving forecasting accuracy.

However, participants also stressed the importance of responsible AI adoption.

For organisations operating within regulated industries, governance remains critical, particularly when handling sensitive financial or customer data.

Businesses must ensure AI solutions comply with internal security policies and regulatory requirements.

7. Real-Time Data is Essential for High-Growth Businesses

For startups and scale-ups, participants agreed that real-time financial visibility is becoming essential.

Unlike mature organisations that often operate using monthly reporting cycles, growing businesses frequently monitor performance weekly—or even daily.

Key areas requiring continuous visibility include:

- Cash burn
- Runway
- Liquidity
- Revenue performance
- Customer acquisition
- Operational expenditure

The ability to make rapid financial decisions was viewed as a major contributor to organisational resilience.

8. Measuring Marketing Across the Entire Customer Journey

Participants discussed how marketing effectiveness should no longer be measured purely by lead generation.

Instead, organisations increasingly evaluate performance across the complete customer lifecycle, including:

- Marketing Qualified Leads (MQLs)
- Sales Qualified Leads (SQLs)
- Conversion
- Implementation
- Customer onboarding
- Product activation
- Customer retention
- Revenue growth

Finance teams are increasingly partnering with marketing to understand how investment influences long-term commercial performance rather than short-term campaign metrics alone.

9. Growth Requires More Than Technology

The second half of the discussion shifted from technology towards leadership and organisational capability.

Participants agreed that sustainable growth requires the right mindset alongside the right technology.

Key themes included:

- Remaining open to change
- Encouraging innovation
- Embracing new opportunities
- Learning continuously
- Challenging existing assumptions

One particularly interesting discussion focused on measuring **the cost of inaction**, rather than simply evaluating the ROI of new initiatives.

Participants noted that delaying change often creates larger long-term costs than investing early.

10. Building Strong Operational Foundations

While technology enables growth, participants agreed that operational discipline underpins long-term success.

Key priorities included:

- Well-structured data
- Scalable processes
- Flexible systems
- Strong governance
- High-quality reporting

Businesses that invest early in operational foundations are better positioned to scale without creating unnecessary complexity.

11. People Remain the Greatest Competitive Advantage

Although AI and automation dominated many conversations, the discussion ultimately returned to people.

Participants emphasised that organisations must continue investing in:

- Leadership development
- Employee capability
- Future skills
- Cross-functional collaboration
- Organisational culture

Technology will continue evolving rapidly, but organisations that develop adaptable, highly skilled teams will be best positioned for long-term success.

12. The Value of Community Learning

The roundtable concluded with reflections on the value of peer learning.
Participants welcomed the opportunity to openly share practical experiences, challenges and lessons learned under Chatham House Rules.
The discussion reinforced the importance of community collaboration in helping senior leaders benchmark their approaches, validate decisions and gain practical insights from peers facing similar strategic and operational challenges.
The insights generated during the session will be consolidated and shared with **Fin.Tech Marketing Community** members, supporting knowledge exchange across the UK, US and APAC communities.

Key Takeaways

- Marketing and finance alignment is becoming a critical driver of business performance.
- Shared commercial metrics improve accountability and investment decisions.
- Real-time financial visibility enables faster, more effective decision-making.
- Cloud technology has transformed forecasting, collaboration and operational transparency.
- Integrated technology ecosystems create stronger business intelligence.
- AI offers significant opportunities but must be implemented with appropriate governance.
- Measuring marketing across the full customer lifecycle provides a more accurate picture of business impact.
- High-growth businesses benefit from agile planning and flexible budget allocation.
- Sustainable growth depends on strong operational foundations, quality data and scalable processes.
- Leadership, culture and continuous learning remain essential for navigating rapid technological change.
- Community-driven knowledge sharing enables organisations to learn faster and make more informed strategic decisions.

About Fin.Tech Marketing Community

Fin.Tech Marketing Community is a global network of senior marketing, growth, product and business leaders working across financial services and technology. Through conferences, leadership roundtables, research, networking and peer collaboration, the community provides a trusted platform for sharing practical insights, benchmarking best practices and advancing the future of fintech marketing.

This summary captures the key themes and collective insights discussed during the Marketing & Business Leadership Roundtable held on ***2 July 2026****. In keeping with Chatham House Rules, the report reflects discussion themes without attributing comments to individual participants or organisations.*

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