



# Breaking Into the Financial Vertical as an Alternative Data Startup: Tips from Sarah Smith

*CRO & Co-Founder of Seek AI | VP Head of Sales Financial Vertical of Edison | GTM Advisor at BattleFin*

## The Reality of Selling into Finance as a New Data Provider

If you're a startup entering the institutional data space, here's the hard truth: this is a long sales cycle—6 to 12 months at minimum. Many founders assume interest equals traction, but in this vertical, it takes far more than a single pitch to get to a signed deal.

Sarah Smith, GTM expert, CRO of Seek AI, and former VP Head of Sales Financial Vertical of Edison, has been through it. At Edison, she took Edison from \$0 all the way to acquisition by YipitData by building pipeline through consistent presence, strategic event exposure, and patience.

Here's her take on what it really takes to succeed:

### 1. DON'T EXPECT IMMEDIATE SALES

Your first meeting will likely not lead to a sale. Institutional buyers need multiple touchpoints to build trust and understand the real value of your product. Events like BattleFin give you these repeated interactions in a strategic way—throughout the year.

### 2. USE EVENTS TO PITCH, LEARN, AND EVOLVE

Events are more than sales opportunities—they're feedback loops. Use Discovery Day and similar formats to pitch, gather feedback, iterate, and return to the same buyers with an improved product. This shows you're listening, adaptable, and building something that fits their needs.

### 3. CONSIDER A DESIGN PARTNER

If you're not getting traction early, don't panic. Look for a design partner—an institutional client willing to collaborate and give feedback while you fine-tune your solution. This relationship can shape your product and give you your first proof point.

### 4. FOCUS ON RELATIONSHIPS, NOT TRANSACTIONS

This space is built on relationships. Buyers want to know you're in it for the long haul. Stay engaged, follow up, share progress, and treat every touchpoint as part of a longer conversation.

### 5. BATTLEFIN AS AN ALT DATA INCUBATOR

BattleFin isn't just an event—it's an ecosystem.

We bring the community together 4–5 times a year to support the sales process. From buyers and startups to AI experts and service providers, we help providers like you:

- Build awareness
- Get product feedback
- Learn pricing, delivery, and GTM strategies
- Develop real connections

Sarah credits events like BattleFin with helping Edison go from early-stage startup to revenue growth—through speaking engagements, lead follow-up, product iteration, and strategic support.

Be patient. Be consistent. Keep showing up. That's how you win in this space—and we're here to help make it happen.

Questions or want to explore how BattleFin can support your GTM journey? Reach out to our Market & Event Strategist at [nina@battlefin.com](mailto:nina@battlefin.com)