



Client Success Story

FinTech Company X AIMS Consulting Services

How AIMS Built a GTM Engine for One of India's Leading Investment Tracking & Management Platforms for HNI/UHNIs and Family Offices

Company Overview

The fintech company has built an automated, multi-asset portfolio tracker designed for HNIs, UHNIs, Family Offices, Angel Investors, and leadership teams managing complex investment portfolios.

The platform helps investors track, analyze, and consolidate multi-asset portfolios—including equities, mutual funds, bonds, PMS, AIFs, F&O, unlisted investments, and more—into a single, comprehensive dashboard.

AIMS Consulting Services is a **GTM consulting and implementation partner** that helps B2B businesses design, validate, and scale their go-to-market motions.

We work with enterprises to bring build predictable GTM systems.

The Opportunity

Before engaging AIMS, the FinTech client relied entirely on inbound leads from Google Ads, and had never explored any outbound channels—neither cold calling nor LinkedIn-based outreach.

Their challenge was simple, yet uncommon:

How do you identify, reach, and convert extremely niche, high-net-worth segments through outbound lead generation?

AIMS recommended the FinTech client to launch an outbound channel—something the brand had never experimented with.

However, the first question that came in was: **How do you find HNIs, UHNIs & Family Offices on LinkedIn?**

Most of these profiles do not label themselves with obvious titles.

This required AIMS to go beyond standard searches and build:

Advanced keyword combinations

Occupation-driven targeting filters - MD, CXOs, Investors

Family office-specific search keywords

Investor and business community mapping

We were building a method to surface hidden high-net-worth audiences on LinkedIn that the FinTech client previously believed were not possible to find.

GTM: Designing an Outbound for HNI Market

Objective: Build a scalable, outbound-led GTM motion to reach HNIs, UHNIs, and Family Offices—segments that are traditionally hard to identify, access, and convert through conventional channels.

Our GTM Approach

GTM Discovery Before Execution

- How HNIs and Family Offices discover and evaluate investment tools
- Which personas influence adoption (Founders, CXOs, Principals, Investors)
- What signals indicate readiness for portfolio consolidation tools

ICP Design for a “Hidden Market”

- Occupation-led identifiers (MDs, CXOs, Investors)
- Community-based discovery (business groups, investor networks)
- Keyword-led discovery for Family Offices and private investment entities

Channel Strategy as a GTM Lever

- LinkedIn → Discovery & validation
- WhatsApp → Faster engagement & trust
- Calls → Qualification & intent confirmation

GTM Feedback Loop

- ICP refinement
- Keyword & filter optimisation
- Persona prioritisation
- Messaging clarity

The First Breakthrough

In the very first month, **AIMS assisted the client to schedule 10 qualified meetings**—a shocking revelation for the FinTech client team, who previously believed:

- HNIs/UHNIs won't respond to cold outreach
- Outbound cannot outperform paid inbound campaigns
- LinkedIn cannot be used to target Family Offices

The results changed everything.

Outbound was no longer an experiment—it became the FinTech client's new acquisition strategy.

The impact was so strong that the FinTech client's Head of Growth personally purchased a Sales Navigator license to amplify targeting efforts from his own side.

In addition to this,

- Based on the reachouts and appointments scheduled, an insight was drawn that the FinTech client's solution has a higher acceptance in Family Offices as compared to other segments.
- The analysis revealed that the channel best suited for reachouts to the target audience is Whatsapp and LinkedIn.
- The analysis led to focused targeting and industry penetration creating a competitive edge.

Building a Multi-Layered Targeting Strategy

With ICP clarity improving, AIMS expanded the outreach to several high-value audience groups:

MD & CXOs of listed and mid-cap companies

Small company owners with high personal net worth

Family office principals

Angel investors & investor networks

Wealth-focused business groups

By continuously refining keywords, data sources, lists and filters, AIMS ensured every prospect approached had genuine potential to convert.

Creating Outreach Assets That Even the FinTech client Adopted

During the outreach process, AIMS crafted a high-performing calling script that:

- Generated consistent interest
- Simplified the explanation of a complex product
- Improved qualification conversations

The script worked so well that the FinTech client's inbound sales team adopted it internally—another validation of the quality of AIMS' strategic input.

Scaling the Partnership Beyond Lead Generation

As results grew, AIMS expanded support to the client for assisting in building high-quality customized databases for targeted campaigns.

We helped the FinTech client build segmented prospect data for:

- Indian investor communities
- SEBI-registered entities
- CXOs of mid-cap & small-cap listed companies
- Family offices
- Startup founders
- Business communities & networks

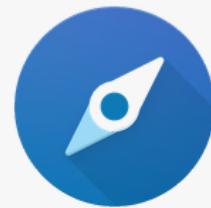
This enabled the FinTech client's internal sales team to run laser-focused outreach campaigns parallel to AIMS' ongoing outbound programs.

Over 11 months, AIMS helped the FinTech client: **Achieve 117 qualified leads through 5,364 reachouts across Email, Calls, LinkedIn & WhatsApp**

This success story didn't just prove that outbound works for niche financial audiences—
it showed that the right strategy can uncover high-intent leads where most believe none exist.

GTM Tech Stack

Prospecting Tools



Data Extraction Tool



PhantomBuster



Whatsapp Automation



Contact Extraction Tools



At AIMS Consulting Services

We design, validate, and implement GTM motions for niche, high-value markets—
where precision matters more than reach.

Contact us

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