

GROWING LOANS WITH A 200% LEAD SURGE

A Commercial Banking Institution

CLIENT NAME AND SPECIFIC DETAILS PROTECTED UNDER NDA

A GAN-FALL CLIENT

Industry: Commercial Banking

Size: ~70 employees, \$20M revenue

Location: Midwest, USA

This commercial banking institution offers tailored financial solutions, including business loans, treasury management, and merchant services, helping mid-sized firms grow with loan approval rates 25% faster than industry averages, per internal data. With a dedicated team of approximately 70 employees and \$20M in annual revenue, they've built a strong reputation in the Midwest, serving clients in manufacturing, retail, and construction. Located in a business-friendly region, they aim to expand their loan portfolio, attract larger clients, and grow into a \$50M banking leader.

BUSINESS CHALLENGES

- Low lead volume: 15 per month, mostly small businesses, unfit for \$500K+ loans.
- High CAC: \$1,500 per client, cutting margins on \$750K average deals.
- Slow outreach: 25 hours weekly chasing leads, delaying loan processing.
- Competition: National banks locked up bigger commercial clients.

OBJECTIVES

- Boost leads to 45+ monthly, targeting \$500K+ loan deals from growing firms.
- Reduce CAC to \$480, freeing funds for marketing and hires.
- Hit 90% lead fit for businesses with 50+ staff needing financing.
- Cut outreach time by 70%, focusing team on underwriting and pitches.

SOLUTION

Our AutoReach Pro initiative:

- Targeted 3,000+ CFOs and business owners with 50+ staff seeking capital.
- Ran 5-touch campaign: LinkedIn pitches with approval stats, emails with loan terms, SMS consult invites, follow-ups, nurture drips for non-responders.
- Used AI scoring to reach 90% lead fit, cut low-value chases by 75%.
- Synced with Salesforce, automated tracking, sped up loan applications.

RESULT AND BENEFITS

After 8 months (Q1 2022):

- Leads rose from 15 to 45 per month, a 200% jump, filling pipeline with manufacturing clients.
- CAC fell from \$1,500 to \$480, a 68% drop, funding two new loan officers.
- Revenue grew with \$2M loan portfolio increase, \$6M more in pipeline.
- Outreach time dropped from 25 to 7 hours weekly, a 72% gain, boosting approval speed by 20%.
- \$48K investment returned 40x in revenue, aiming for \$50M target.

"We've never used something like this before and I was skeptical but you and your team put the time and effort to explain everything to me and tailor your system to how things work here and now it feels like we have a extra team."

— Chief Operating Officer