

The B2B fintech *playbook*

How to become a fintech ChatGPT names when finance and compliance teams ask for a shortlist



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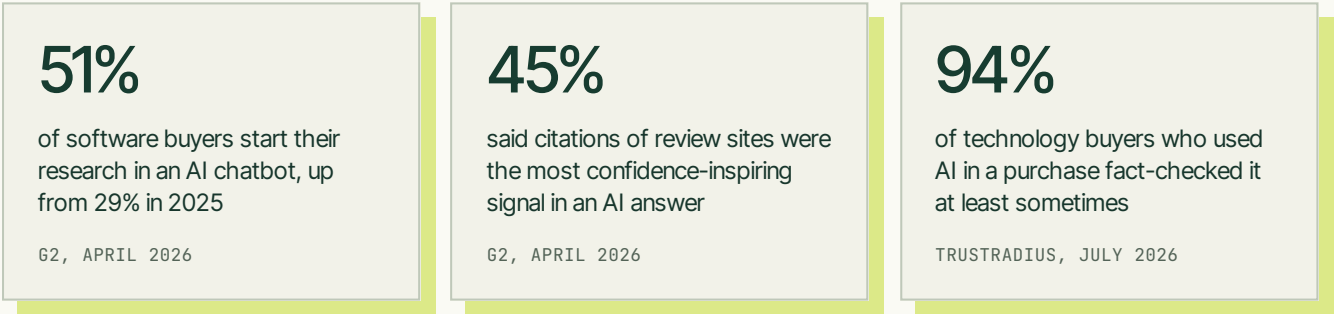
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AI assistants name fintechs they can match to a buyer's use case and then confirm somewhere else. Make your Financial Services Register entry, website, Companies House record and profiles agree, state your security certifications in text, and connect every old or acquired name to your current one. Then publish a page for each buyer use case and track the same buyer questions every month.

For founders and commercial leaders at UK B2B fintechs in payments, lending platforms, regtech, wealth and treasury tools and open banking.

Business buyers of financial software now do part of their due diligence in a chat window. In G2's April 2026 survey of 1,076 software buyers, 51% said they start their research in an AI chatbot, up from 29% in 2025. A finance director choosing a payments provider, or a compliance lead choosing a KYC platform, asks ChatGPT or Copilot for a shortlist. Then they ask whether each name is regulated, secure and used by firms like theirs.

Buyers also check what they are told. TrustRadius found in July 2026 that 63% of technology buyers used AI during their purchase, and 94% of those fact-checked it at least sometimes. In fintech the facts sit on the FCA's Register, Companies House, partner directories, review sites and the trade press. If you have merged, rebranded or restructured, those sources are more likely to disagree. When they do, the assistant hedges or names a rival that is easier to confirm.



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The questions that decide *who gets the call.*

Buyers first describe a use case to get a shortlist, then name a provider and ask about regulation, security, ownership or integrations.

BUYER ASKS

Which payment providers suit a UK B2B firm collecting invoice payments by bank transfer?

BUYER ASKS

Is this provider authorised by the FCA, and for which payment services?

BUYER ASKS

Which loan origination platforms do UK SME lenders use?

BUYER ASKS

Who owns this platform, and which lenders use it?

BUYER ASKS

Which KYB and KYC providers do UK wealth managers use?

BUYER ASKS

Does this provider integrate with Salesforce, and where is our data stored?

BUYER ASKS

What treasury management software suits a UK mid-market finance team?

BUYER ASKS

Is this provider enrolled in the Open Banking Directory?

TRY THIS

Ask five of these in ChatGPT, Gemini, Claude, Copilot and Perplexity, each in a fresh chat. Note who is named, and who is named instead of you. Answers vary from run to run, so only count a result that repeats.

How the assistants choose

01 A stated use case and customer

'Client onboarding checks for UK fund administrators' matches a buyer's question. 'An identity orchestration layer' matches nobody's.

02 Regulatory status that matches the Register

The assistant can only compare what it finds. Your firm name, FRN and status on your site need to match your Financial Services Register entry, or a careful answer hedges.

03 Security credentials in text

Buyers ask whether a provider is certified. The assistant can answer only if the certification, certifying body, scope and date are written on a page it can read.

04 Listings that confirm what you connect to

Marketplace and partner listings confirm your integrations from a source you do not control, which is how an assistant checks a claim on your own site.

05 Reviews and trade press

Reviews from the kind of firm the buyer runs, and coverage in the fintech press, give the assistant independent evidence to name you.

06 One company, not two

After an acquisition or rebrand, assistants may keep treating the old name as a separate firm, sometimes as your competitor, until something tells them otherwise.

The sources assistants *trust in your field.*

An assistant rarely names a firm on its own website's word. It looks for the same facts in places that have checked you independently. These are the ones that matter most for fintech.

SOURCE	WHY IT COUNTS	WHAT TO DO
FCA Financial Services Register	It is the public record of authorised firms, and B2B-only services appear on the full Register, not the consumer Firm Checker.	Treat it as your master record and keep your name, permissions and contact details correct through Connect.
Companies House	It confirms your company name, number and registered office, which buyers and assistants set against your website.	Check that your website footer and legal page give the same company name and number.
Open Banking Directory	Open Banking Limited lists companies directly enrolled in the directory and authorised to provide open banking-enabled services.	Make sure your enrolment and name match your website if you are an account information or payment initiation provider.
Salesforce AppExchange, Microsoft AppSource and the Xero App Store	Each listing confirms an integration from outside your own website.	Publish one listing per integration, using the same product name and use case as your website.
Banking, scheme and technology partner pages	For payments, cards and embedded finance, a partner naming you confirms who you work with.	Ask each partner to name you and describe the work you do together.
G2, Capterra, Gartner Peer Insights and TrustRadius	In G2's April 2026 survey, 45% of software buyers called review-site citations the most confidence-inspiring signal in an AI answer.	Ask your last ten customers where they read reviews, and gather reviews there from the firms you want to be named for.
AltFi, Finextra and The Paypers	Fintech buyers and investors read them, and coverage gives assistants an independent account of your firm.	Pitch them results, data and people, not only funding news.

Common mistakes

Trusting the redirect after an acquisition

A redirect can be technically correct and still leave assistants treating two names as two companies. ID-Pal found AI answers recommending NorthRow, the firm it had bought, as a rival.

Describing the technology, not the buyer's problem

Shortlist questions are answered from pages that describe the use case in the buyer's words. Most fintech websites describe the technology instead, so they are described but not recommended.

Leaving your regulatory status unclear

An assistant that finds no Register entry and no explanation may guess. If you are not authorised, say so in one sentence, and never imply authorisation you do not hold.

Publishing without a promotion sign-off route

A website or a social post can be a financial promotion, depending on what it says and who it reaches. Agree a sign-off route with your compliance lead before you publish at volume.

Ten questions. *Be honest.*

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| 01 | Does your homepage say which buyer and which use case your product serves, in the words that buyer uses? | ☐ Yes ☐ No |
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| 02 | Do the firm name, trading names, FRN and status on your website match your Financial Services Register entry exactly? | ☐ Yes ☐ No |
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| 03 | Is your regulatory position in one plain sentence in your footer, naming your principal if you have one or saying plainly if you are not FCA authorised? | ☐ Yes ☐ No |
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| 04 | Do your Companies House record, LinkedIn, G2 and marketplace profiles use the same names as your website, with your legal name and FRN in the description? | ☐ Yes ☐ No |
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| 05 | Have you connected every acquired or retired name to your current one with redirects, structured data on both domains and one page that explains it? | ☐ Yes ☐ No |
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| 06 | Does a public security page state each certification with its level, certifying body, scope and date, plus where data is stored and how it is encrypted? | ☐ Yes ☐ No |
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| 07 | Do you have a separate page for each buyer use case, opening with the question that buyer types? | ☐ Yes ☐ No |
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| 08 | Is each integration listed on the marketplace it runs on, with the same product name and use case as your website? | ☐ Yes ☐ No |
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| 09 | Do you have recent reviews on the sites your buyers read, from the kind of firm you want to be named for? | ☐ Yes ☐ No |
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| 10 | Do you run a fixed list of buyer questions in the main assistants every month, so you know how often you were named? | ☐ Yes ☐ No |
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Fewer than seven yeses means buyers asking an assistant for a shortlist in your segment are probably being given other names.

What to do this month, *and next*.

This month

- 01 Put your Register entry, Companies House record, website footer and main profiles in one sheet, and correct every difference in name, FRN, status, principal and contact details, starting with the Register.
- 02 Add a plain regulatory sentence to your footer: who you are, whether you are authorised by the FCA and, if relevant, your principal and its FRN.
- 03 List every brand, product and company name you have traded under or acquired, and check that each one points to your current name.
- 04 Publish or update your security page with each certification, its level, certifying body, scope and date, where customer data is stored and how often you commission penetration tests.
- 05 Write the first use-case page for the segment you most want to win, opening with the exact question that buyer would type.
- 06 Agree a content sign-off route with your compliance lead, so guides stay general and dated and anything inviting a reader to take up a regulated product goes through your promotion checks.

The next ninety days

- 01 Declare the relationship with every acquired or renamed brand in structured data on both domains, publish one plain page explaining what the old brand is now, and update every profile you control to the current name.
- 02 Publish one page per buyer segment, each naming the regulator that buyer answers to and answering the question inside the first ninety words.
- 03 List each integration on the marketplace it runs on, and ask each banking, scheme and technology partner to name you and describe the work.
- 04 Ask your last ten customers where they read reviews, then gather recent reviews there from the firms you want to be named for.
- 05 Offer AltFi, Finextra or The Paypers a story built on your results, data or people rather than a funding round.

How to tell it is working

- Ask 20 to 50 buyer questions several times a month in ChatGPT, Gemini, Claude, Copilot and Perplexity, in a clean session, covering both shortlist and check questions.
- Count a win only when it repeats, report losses too, and note any answer that still names an old or acquired brand as a separate firm.
- Ask the assistants what your firm does, then ask your buyers' questions. If the first answer is right and the second leaves you out, you are being described but not recommended, and use-case pages are the fix.
- Expect changes within weeks in assistants that search the web live, and months for answers drawn from a model's own memory.

Straight answers.

Do we need to be FCA authorised to be recommended by ChatGPT?

No. Many B2B fintechs, especially in regtech and treasury software, sell to regulated firms without holding FCA permissions. What matters is that your status is stated plainly and matches the public record. Implying authorisation you do not hold is the fastest way to lose a buyer.

How long before ChatGPT starts naming us?

Assistants that search the web live, such as ChatGPT search, Perplexity, Copilot and Google's AI features, can reflect a new page or corrected listing within weeks. Answers drawn from a model's own memory change only when it is retrained, which takes months. Measure with the same questions every month so you can see which is which.

Should we publish our SOC 2 report or ISO 27001 certificate?

Publish the facts about them: which report or certificate, its scope, the audit or certification firm and the date. The documents themselves can stay behind an NDA. An assistant can then answer 'is this provider certified?' correctly, and a buyer knows what to ask for.

Does G2 matter for a fintech that sells to banks and large firms?

It matters if your buyers read it. In G2's April 2026 survey, 45% of software buyers called review-site citations the most confidence-inspiring signal in an AI answer. Buyers at larger firms may also look at Gartner Peer Insights, analyst coverage and references. Ask your last ten customers where they read reviews, and start there.



ID-Pal sells KYC and KYB identity verification to fund administrators, wealth managers, law firms and accountants, the kind of compliance buyers this playbook is written for.

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UK buyer questions where AI now names ID-Pal

PROBLEM	Traffic to the pages that bring in enquiries fell by around 40 per cent after the NorthRow move, and AI never put ID-Pal on a UK shortlist.
WHAT WE DID	A Paid Discovery found the cause in a week. The fix was live in week one, then we rebuilt the pages buyers ask about.
RESULT	Named on four UK buyer questions by September 2026, up from none in May.

"They work like founders: they get on with it, and they tell you the truth."

Dan Brooksbank, Marketing Director, ID-Pal

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How does a B2B fintech get recommended when buyers ask ChatGPT?



How does a B2B tech company get recommended when buyers ask ChatGPT?



Why does ChatGPT sound unsure about our firm, and how do we fix it?



Why does ChatGPT describe my firm wrongly, and how do I fix it?



Do we need schema markup for AI assistants to understand our site?



How do we find out whether ChatGPT is recommending our firm?



SOURCES

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Ashley spent thirteen years at Digitas, rising from analyst to Head of Data, Analysis and Insights and building a team of nearly fifty across Europe and Asia. At Fortitude she designs the measurement behind every client report and the research we publish.

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