

How SOC 2 Became This AI Startup's Competitive Edge

A San Francisco-based SaaS company specializing in AI-powered customer support solutions sought to enhance its enterprise sales potential. The organization needed to establish robust security credentials to meet growing demands from large-scale clients while maintaining its agile development approach.

Industry: Customer Support | **Location:** San Francisco, USA | **SOC 2 Focus:** Security, Availability, Confidentiality

The Challenge

- This fast-growing AI startup specialized in transforming how companies manage customer support using automation. As it started landing enterprise deals, prospects began requesting SOC 2 certification as a prerequisite to doing business.
- Without it, the company risked **losing high-value contracts** and being perceived as unprepared to handle sensitive customer data.

The Approach

- Our team partnered closely with the company’s leadership and engineering teams to implement a tailored SOC 2 compliance roadmap that wouldn't disrupt their product velocity:

Gap Assessment

Identified missing controls across Security, Availability, and Confidentiality

Tooling & Automation

Integrated GRC tool DRATA to support evidence collection and control monitoring

Policy Framework

Delivered lightweight but audit-ready security policies aligned with the company’s culture

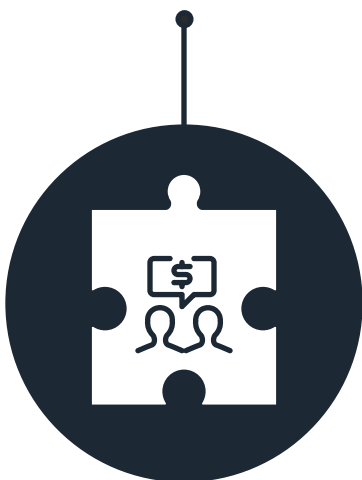
Audit Readiness

Guided them through readiness assessments, evidence collection, and auditor interactions

The Outcome

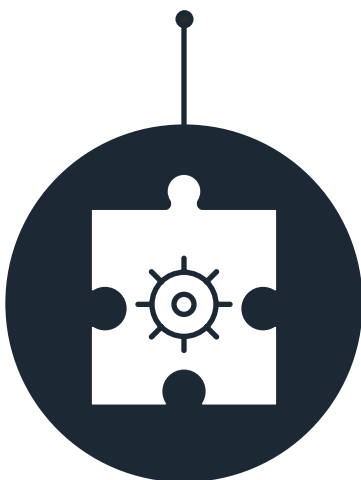
- In just under 60 days, the company achieved its SOC 2 Type I report, demonstrating its commitment to secure operations. **This enabled them to:**

Close 3 major enterprise deals within the quarter



Establish a clear security narrative in their sales process

Reduce procurement friction in ongoing B2B negotiations



Key Takeaways

- Fast, lightweight SOC 2 path without slowing innovation.
- Transformed security into a **competitive differentiator**.
- Positioned the company for **scalable growth with compliance embedded**.

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Want to remove security roadblocks from your sales cycle?

Contact us today to understand how we helped similar AI companies close deals 3x faster with SOC 2!