



OotaOS — Marketing Playbook

OOTAOS PLATFORM SERVICES PRIVATE LIMITED

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OotaOS — Marketing Playbook

The AI Marketing Engine · ICPs, Channels, Campaigns, Funnel & Lifecycle

OotaOS Confidential — Prepared for Prospective Investors

July 2026 (v5 — grounded in production release `76f67d0`) OOTAOS PLATFORM SERVICES PRIVATE LIMITED · CIN U62011KA2026PTC223286 · Bengaluru, Karnataka

Grounding: every product claim in this playbook traces to capability shipped in production release `76f67d0`. Conversion rates, CAC, and funnel figures are pre-GA design targets; production telemetry replaces them from M1. The trial offer is a 14-day free trial.

1 · The GTM asymmetry

Industry CAC for restaurant SaaS: **\$1,400–\$2,000** (sales reps, trade shows, resellers). OotaOS design-target CAC: **\$140 — 10× lower.**

The lever is an **AI-driven outreach engine feeding a ~38,770-record proprietary restaurant database**, scaling to 300K by M6, reached through WhatsApp-first channels that bypass the email gating which blocks 85%+ of Indian eateries from competitors. Phone-first identity meets the market where it actually lives.

The product itself completes the asymmetry: a genuinely self-serve on-ramp (AI menu scan → QR bootstrap → first order, ~8-minute target) means outreach converts without a field sales force, and two product-true lead magnets (Section 10) do qualification work no cold email can.

2 · The proprietary database asset

- **~38,770 records** (verified 7 July 2026) — self-collected from Overture Maps, OpenStreetMap, Swiggy/Zomato public data, and the FSSAI public register. All records are **prospects — none are customers**.
- **7 Indian metros** currently covered.
- **Target: 300,000 records by M6** via the Overture Maps DuckDB pipeline + Geofabrik India PBF extracts.
- Fields: restaurant name, address, phone (where available), cuisine type, aggregator presence, estimated size.
- **~10% phone coverage today → 40%+ target** with enrichment; **~85% WhatsApp reachability** on covered phones (India).

No competitor has self-collected restaurant phone + location data at this scale. This is a GTM moat — and it compounds: every enrichment pass and every outreach response makes it more valuable.

3 · Ideal Customer Profiles

ICP-1 — INDIA DINE-IN QSR / CASUAL-DINE WITH A QR-ORDERING NEED (*SHIPPED — PRIMARY BEACHHEAD*)

Owner-operated or small-chain restaurants in Indian metros/tier-2, 20–120 covers, taking UPI, often juggling multiple aggregator tablets. The whole scan-to-serve + realtime KDS + UPI/Razorpay stack is built India-first; aggregator ingestion (Zomato, Swiggy, UberEats, DoorDash, Menulog — inbound, one KDS) consolidates their tablet chaos.

ICP-2 — INDIAN STREET VENDORS / MICRO-EATERIES (OOTAOS LITE) (*SHIPPED, INDIA FIRST*)

Single-operator carts, tea stalls, small takeaways with a UPI VPA and an Android phone — no POS, no card reader. Lite is purpose-built: commission-free micro-pricing of **\$0.002/order**, on-device UPI SMS auto-confirmation (8 banks), and a **~\$0.01 self-test onboarding** that proves the whole chain in ~30 seconds. The vendor download funnel opens once the signed APK is hosted; international Lite billing (**\$0.05/order** via Stripe) is priced and designed, activating after India. Lite runs as a field-sales / QR-sticker motion rather than inside sales.

ICP-3 — AU / INTERNATIONAL INDEPENDENTS & SMALL GROUPS (*SEQUENCED AFTER INDIA TRACTION; MATURES WITH TAX/BILLING ACTIVATION*)

Australia-first (subscription-law compliance already shipped, a year early), then UK/EU/SG/AE/MY where Stripe billing is live. Lead with **compliance + professionalism**, not price.

ICP-4 — MULTI-OUTLET OPERATORS SWITCHING OFF A LEGACY POS (*SHIPPED*)

2–10 location groups on Petpooja, POSist, Square, Toast, Clover, etc. The AI migration engine (13+ POS fingerprints, dry-run-first, readiness score, PDF report) removes the #1 switching blocker. Sold as **consolidation** (per-location billing is not yet a metered dimension).

4 · Personas and their hooks

Persona	Cares about	Hook (traceable to shipped capability)
Owner-operator	Margins, growth, commissions	Forecasting/margin intelligence; commission-free direct QR channel + Lite
Restaurant manager	Table turns, floor control	Live-ops + floor view; waitlist + Order-While-You-Wait
Head chef / kitchen lead	Clean tickets, right prep	~1-second KDS, per-item status, prep optimiser
Cashier / front staff	Fast, correct payments	POS with cash/card/UPI/Razorpay; mark-paid loyalty
Multi-outlet operator	Standardisation, oversight, safe migration	Master admin, tamper-evident audit, AI migration
Street vendor (Lite)	Zero cost, dead simple, phone-only	UPI SMS auto-confirm, \$0.002/order, ~\$0.01 self-test

5 · Pains → the OotaOS answer

Pain (in the customer's words)	The answer
"Five aggregator tablets, one confused kitchen"	Single realtime KDS ingesting all channels — one queue
"Orders get missed between table and kitchen"	QR-to-KDS in ~1 second
"Aggregator commissions eat my margin"	Own direct QR channel + commission-free Lite; channel-shift modelling
"Building a menu digitally takes forever"	AI menu scan — first item appears in ~1 second
"Switching POS means losing my data"	AI migration: fingerprint, dry-run first, readiness score, PDF report
"Loyalty is a spreadsheet I never update"	Automatic bank-grade wallet across visits
"I can't read demand — I over- or under-prep"	Demand forecast + prep p50/p90 targets
"Tax/compliance across markets is scary"	12-country tax engine (built and tested, activation-gated); AU law shipped a year early

Buying triggers (*frequency to be validated in pilots*): new outlet / venue refit · aggregator commission hikes · a bad service night or reconciliation mess · compliance deadlines (AU subscription law, GST changes) · POS contract renewal · festival-season ramp (the festival planner is a timely hook).

6 · Positioning & message house

Positioning line: "The AI-native operating system for restaurants."

Hero: "The operating system for restaurants that want to win." Sub: From QR menus and a one-second kitchen display to AI upselling, card and UPI payments, and delivery-order ingestion — OotaOS replaces every tool you're paying for separately.

The 25-word customer version: Turn every table into a self-serve ordering point, cut kitchen chaos with a live display, and reward regulars automatically — no extra hardware, no card reader required.

Six capability pillars:

1. **Scan-to-Serve Operations** — QR dine-in ordering, ~1s realtime KDS, table sessions, service bell, waitlist + Order-While-You-Wait.
2. **Revenue & Growth Intelligence** — streaming AI menu scan, smart upsell, 11-capability deterministic intelligence layer with ROI ledger, platform loyalty.
3. **Global Billing & Compliance Engine** — dual-gateway (Razorpay India + Stripe 7 markets), branded FY invoicing, 12-country tax engine (built, activation-gated), AU compliance live a year early, DB-enforced money integrity.
4. **Zero-Friction Onboarding & Migration** — 13+ POS fingerprints, staging-first dry-run, readiness score, camera menu import.
5. **OotaOS Lite** — zero-commission street-vendor tier, on-device UPI SMS confirmation, self-verifying ~\$0.01 test-payment onboarding.

6. **Platform Command & Trust** — master-admin command center, dual-approval God Mode with tamper-evident audit, cost-governed AISI support AI, 544-file test estate.

Supporting headlines: “Your menu, live on every table — in 15 languages.” · “Orders hit the kitchen in about a second.” · “No card reader. No monthly fee. (That’s OotaOS Lite.)” · “Switch off your old POS without losing a single record.” · “Built and tested for 12 countries’ tax rules.”

CTAs: Primary — **”Start your 14-day free trial” / ”See it on your menu — scan to import.”** Secondary — “Book a live demo” / “Get the migration readiness report” / “For street vendors: get OotaOS Lite.”

7 · Proof points (code-true — the only metrics quoted)

- **Depth:** ~624 API endpoints · ~249 database tables · 82 SPA routes · 27 background jobs · **29 verified AI capabilities** · 13+ POS import fingerprints · 15-language diner menu · 10 currencies.
- **Quality bar:** **4,700+ automated tests across 544 files, zero skipped**; boot-fatal configuration guards.
- **Correctness engineering:** database-enforced money integrity (`subtotal + tax + service + tip = total`), immutable tax snapshots, CAS-guarded order state machine, idempotent loyalty earn.
- **Readiness:** **98/100 pilot-ready** (26-scenario independent gate).
- **Trust architecture:** strict CSRF (boot-fatal), AES-256 encrypted gateway keys, dual-approval God Mode with tamper-evident audit, three-layer PII masking in support AI.
- **Cost discipline as a differentiator:** 60–80% of the AI workload runs on in-house deterministic engines at near-zero token cost; external AI calls use cost-efficient models with strictly guardrailed token budgets — so the AI cost per restaurant is considerably low.

Pre-GA and pre-revenue: the proof story is product depth and engineering readiness — not uptime percentages, customer counts, or revenue figures, which do not yet exist.

8 · Outreach channels (priority order)

8.1 WHATSAPP — PRIMARY, INDIA

- Bulk outreach via a BSP (AiSensy / Interakt / Gupshup — selection in progress).
- Template: problem-aware opener → demo link → QR code to trial signup.
- Why: ~500M Indian WhatsApp users; ~85% open rate vs ~20% email.
- **Compliance: opt-in required per WhatsApp Business Policy. Warm outreach only.**

8.2 VOICE / MISSED CALL — SECONDARY, INDIA

- Outbound IVR or agent call to verified numbers; “Press 1 for a free demo” hook. Targets restaurants without WhatsApp.

8.3 EMAIL — INTERNATIONAL + TECH-SAVVY INDIA

- Personalised cold outreach via the Zoho/ZeptoMail chain; subject-line variants A/B-maintained in the AI Marketing dashboard; CTA = 30-minute demo booking.

8.4 QR DROP — HYPER-LOCAL FIELD MOTION

- Physical QR sticker drops at restaurant clusters (Koramangala, Indiranagar, HSR — Bengaluru first). Links to demo + trial. Unit cost under **\$0.06/restaurant**. **This is also the primary Lite (ICP-2) motion.**

8.5 CONTENT / INBOUND

- LinkedIn founder posts (founder network) · restaurant WhatsApp community seeding · FSSAI-compliance SEO guides.
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9 · Campaigns

9.1 FEATURE-LED (*ALL SHIPPED CAPABILITY*)

- **"Scan to kitchen in one second"** — video of the real QR→KDS path. CTA: start a trial with your own menu.
- **"Point your camera. Import your menu."** — the streaming AI scanner as a live lead magnet.
- **"One queue, every channel"** — Zomato/Swiggy/UberEats/DoorDash/Menulog orders on one KDS.

9.2 BENEFIT-LED (*UPLIFT CLAIMS QUANTIFIED FROM PILOT TELEMETRY BEFORE USE*)

- **"Grow the check without pushing your staff"** — smart upsell from real co-purchase history.
- **"Prep the right amount, waste less"** — demand forecast + prep optimiser.
- **"Reward regulars automatically"** — platform loyalty wallet.

9.3 USE-CASE

- **Busy dine-in QSR** (ICP-1): tablet-consolidation + table-turn story.
- **Street vendor** (ICP-2): commission-free UPI ordering, phone-only — field/QR-sticker motion.
- **POS switcher** (ICP-4): "migrate this week," with the readiness report as the hero artifact.

9.4 INDUSTRY / GEOGRAPHY

- **India dine-in/QSR:** QR + UPI + aggregator ingestion.
- **AU/international:** compliance + branded invoicing + Stripe multi-market. (After India signal.)

9.5 CAMPAIGN THEME MATRIX

Theme	Angle
Awareness	"The operating system for restaurants that want to win."
Education	"What a scan-to-serve restaurant actually looks like" (QR → KDS → pay)
Proof	"Built, not promised: 4,700+ tests, DB-enforced money integrity, 98/100 pilot-ready"
Problem	"Missed tickets and slow tables are a systems problem, not a staff problem"
Competitive replacement	"Switch off Petpooja/POSist/Square/Toast without losing a record"
Launch	"OotaOS is live for pilots" — depth + readiness story
Trial	"Run a real service on OotaOS free for 14 days — seeded with your own menu"

10 · Lead magnets (product-true, highest intent)

1. **Free AI menu digitisation** (*shipped*) — prospect uploads a photo/PDF of their menu; the real scanner returns structured items. The flagship wow moment doubles as qualification.
2. **Migration Readiness Report** (*shipped*) — prospect uploads a POS export; the engine fingerprints it, maps columns, flags issues, and returns a 0–100 readiness score + PDF. The switching CTA in artifact form.
3. **Interactive scan-to-serve demo** (*shipped*) — self-guided QR → order → KDS walkthrough.
4. **AU/tax compliance checklist** (*planned*) — gated PDF for ICP-3.

11 · Conversion funnel & onboarding (design targets)

Stage	Target rate	Notes
Outreach → Demo booked	3–5%	WhatsApp primary
Demo → Trial started	60%	8-minute onboarding target
Trial → Paid (30-day)	25%	Starter plan anchor
Paid → Growth upgrade (90-day)	30%	Feature gates drive the jump
Monthly churn	3% India / 2% international	Design target

Illustrative: 300K database × 4% demo × 60% trial × 25% paid ≈ 1,800 paid restaurants from the first full outreach wave (all design target).

The 8-minute onboarding target — "I clicked the link" → "menu live, first QR ready": signup (90s) → restaurant profile (60s) → **AI menu scan (90s)** → table setup (60s, skippable) → QR download (30s) → first test order (60s) ≈ **7 minutes**, CS-assisted fallback available.

Trial activation milestones (in-product messaging):

- **North-star event: first real order flowing QR→KDS on the trial account.**
 - **M1 Menu seeded:** “Your menu is live — you scanned it in seconds.”
 - **M2 QR live:** “Your tables are ready — download and print your codes.”
 - **M3 First order:** “You just watched an order hit the kitchen in about a second.”
 - **M4 Growth on:** “Turn on loyalty and upsell — start growing the check.”
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12 · Launch sequence

1. **Pre-launch (depth & readiness):** publish proof content (Pillars A–D below), stand up both product lead magnets, open the 14-day trial.
 2. **Design-partner wave:** onboard SAPASA Cafe et al.; instrument the trial→activation funnel from day one.
 3. **India dine-in push (ICP-1):** feature-led + use-case campaigns; aggregator-consolidation angle.
 4. **Lite field motion (ICP-2):** begins once the signed APK is hosted — QR sticker distribution + vernacular content.
 5. **AU/international (ICP-3):** compliance-led, after India signal.
 6. **Switcher campaign (ICP-4):** Migration Readiness Report as the hero asset.
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13 · Content pillars

- **A — Operations & the kitchen line:** “Why order tickets get missed — and the systems fix” · a real order flowing QR→KDS on video · webinar: “Running a 5-channel kitchen as one queue.”
 - **B — Growth & margins (intelligence layer):** “Demand forecasting without a data team” · the ROI-ledger idea (measuring whether advice moved money) · “Cutting waste with deterministic forecasting (and why it’s cheap).”
 - **C — Switching & onboarding:** “How to leave Petpooja/POSist without losing a record” · dry-run preview video · the Migration Readiness Report magnet.
 - **D — Trust, payments & compliance:** “Money integrity you can see in the database” · “Getting ahead of AU subscription law” · encrypted keys + audit chains as buyer-grade trust signals.
 - **E — Street-vendor digital (Lite, vernacular):** “Digital orders with just your phone and UPI” · QR-sticker field content · the one-coin self-test story.
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14 · Nurture sequence (trigger: trial start or lead-magnet download)

- **Day 0:** welcome + “seed your menu by scanning it” (activation nudge).
 - **Day 2:** “print your QR codes” + first-order checklist.
 - **Day 5:** growth features — loyalty + upsell — one-click enable.
 - **Day 9:** proof + trust (money integrity, compliance); address the top objection.
 - **Day 12:** trial-ending value recap + convert CTA. (*AU sends respect the statutory notice cadence.*)
 - **Off-ramp:** non-activators → “let us import your menu for you” concierge offer.
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15 · Sales motion

Handoff criteria (marketing → sales), all observable in-product: completed an AI menu scan or uploaded a POS export for a readiness report, **and** started a trial with QR bootstrap or a test order — or is a multi-outlet profile (ICP-4) regardless of depth. ICP-2 (Lite) routes to the field/QR-sticker motion, not inside sales.

Elevator pitch (30s): “OotaOS is the operating system for restaurants. Guests scan a QR code to order and pay in their own language; the kitchen sees every order in about a second; owners get loyalty, smart upselling and demand forecasting built in. Payments run on Razorpay or Stripe, invoices are bank-grade, and if you’re switching, our AI reads your menu and migrates your data with a dry-run first. No new hardware, and a 14-day free trial.”

Objection cheat-sheet:

- “You’re pre-revenue.” → Depth and readiness, not slideware: ~624 endpoints, 4,700+ passing tests, DB-enforced money integrity, 98/100 pilot-ready. The trial costs nothing to verify.
- “Why not Petpooja/POSist?” → They’re billing-first POS; OotaOS is the whole OS — and our AI migration engine lifts your data across with a dry-run first.
- “We depend on Zomato/Swiggy.” → We don’t fight aggregators, we ingest them: five platforms, one kitchen queue — while you build your commission-free direct channel.
- “Is my data safe?” → Enforced in code, not promised in a policy: DB money constraint, immutable tax snapshots, AES-256 encrypted keys, strict CSRF, dual-approval audit chain.
- “Too much for my staff.” → Turn on only what you need; day one is QR + KDS.

16 · Retention, upsell & referral

- **Retention (shipped):** loyalty wallet keeps regulars returning; daily KDS/live-ops habit makes OotaOS the operational driver; weekly forecast/prep value; branded FY invoicing + compliance stickiness.
- **Tier upsell (shipped):** the big natural jump is **Starter** → **Growth** — upsell, loyalty, CRM, discounts, delivery ingestion, and reservations all sit behind that single gate. Growth is positioned as “*the tier that makes you money.*” Pro today = campaigns + tax filing (thin; to be differentiated deliberately before Pro-led campaigns).
- **Metered add-on candidates (pricing to be set through customer research):** migration Smart Assist buckets and AI-credit uplifts — the metered levers that already exist in code.
- **Referral:** the marketing-partner referral + commission ledger is live with a self-service dashboard (shipped); Lite referral payout is in development.

Partner channel: restaurant accountants/CAs serving 10+ clients · POS resellers · food-industry consultants. Commission structure to be finalised in the Partner Agreement.

17 · Team to run this (funded by the round)

- **AI Marketing & Sales Head (M1):** owns the outreach engine end-to-end — BSP relationship, WhatsApp template compliance, message A/B testing, weekly pipeline reporting to the Founder.
- **Customer Success Lead (M3):** owns onboarding completion; manages SAPASA and early design partners; tracks activation metrics and churn signals.

(Budget context: AI Marketing Engine = 25% of the round, \$200K; Sales & \$320K.)

18 · Case-study template (to be completed as pilots go live — SAPASA Cafe first)

1. The restaurant — segment, size, market, prior stack.
2. The trigger.
3. The switch — readiness score, dry-run, time to import.
4. Day-one setup — QR bootstrap, AI menu import, first order to KDS.
5. What they turned on.
6. Results — *only real, attributable numbers*.
7. In their words.

19 · Launch discipline — capabilities held back from GTM until live

Marketing claims are limited to shipped capability. The items below are tracked explicitly so campaigns never outrun the product:

Capability	Status today	GTM stance
International Lite billing	Priced and designed; activation pending	Campaigns begin when billing is live
Lite Android APK	Built; signing/hosting pending	Vendor download funnel opens on release
v4 tax engine activation	Built and tested, activation-gated per market	Described as “built and tested,” activated market by market
Growth Engine Win-Back / Upsells / Menu-Profit tabs	UI in development	Excluded from demos until complete
Aggregator sync	Inbound ingestion live (5 platforms), receive-only	Marketed as inbound order ingestion
Reservations online payment	Preference capture only today	Excluded until the gateway session ships
Competitor scraping · corporate B2B invoicing · group bill splitting · inventory/COGS	Not built	Not marketed
Stripe existing-subscriber price migration	In development	No automatic-migration promises

20 · Measurement (from M1)

Instrumented and reported weekly from the first outreach wave: outreach volume & channel mix → demo-booked rate → trial-start rate → activation (north-star: first QR→KDS order) → paid conversion → 90-day Growth-upgrade rate → monthly churn → measured CAC by channel. **Every design target in this playbook is replaced by telemetry as it lands.**

All conversion rates, CAC, and funnel figures are design targets (pre-GA); production measurement begins M1.
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