Investment Memo

Overview

Omega is a studio-first AI product company. It delivers custom AI solutions (including AI receptionists) while building Omega AI Builder — a Replit-level platform that converts a prompt into a production-ready workspace.

Product

Studio engine
• High-ticket AI implementations
• AI receptionist deployments
• Custom integrations and workflows

Platform engine
• Guided requirements intake
• Multi-platform generation
• Live preview + file explorer + terminal
• Workspace export + deploy hooks

Market

The convergence of AI capability + runtime infrastructure makes full-stack AI development viable today. The market is large and rapidly expanding.

Business Model

• Studio: implementation fees + retainers
• Platform: subscription tiers + usage credits
• Enterprise: security, SSO, SLAs

Growth Flywheel

Studio projects → domain workflows + case studies → platform credibility → user growth → higher platform revenue → more studio opportunities.

Revenue Potential (12 months)

• Studio: $0.9M–$6.6M in fees + retainers (scenario dependent)
• Platform: $0.6M–$4.8M ARR (scenario dependent)
• Combined upside: **$1–10M+ ARR**

Moat

• End-to-end workflow (build–edit–deploy)
• Vertical playbooks (receptionist, sales, support)
• Usage-based economics
• Studio-led product feedback loop

Risks + Mitigations

• Infra cost → usage caps + routing
• Reliability → sandbox hardening + observability
• Competition → differentiated workflow + studio credibility

Ask

$2.5M seed to scale studio revenue, harden infra, and reach Replit-level MVP.