

# Bizom Retail OS for CPG

# CPG Route-To-Market (RTM) is Costly & Lacks Efficiency

**CPG Brands have a  
*Leaky Bucket Problem*  
with their RTM**



## GTM Challenges

Distribution Inefficiencies

Data Dark with Stale Insights

Supply Chain Leakages

Analog Systems

Outdated Distributor Mgmt Systems

CPGs Spend 30% – 50% of Revenue on RTM

**Schemes & Discounts**  
(4%-6%)

**BTL & Trade Margins %**  
(15% – 30%)

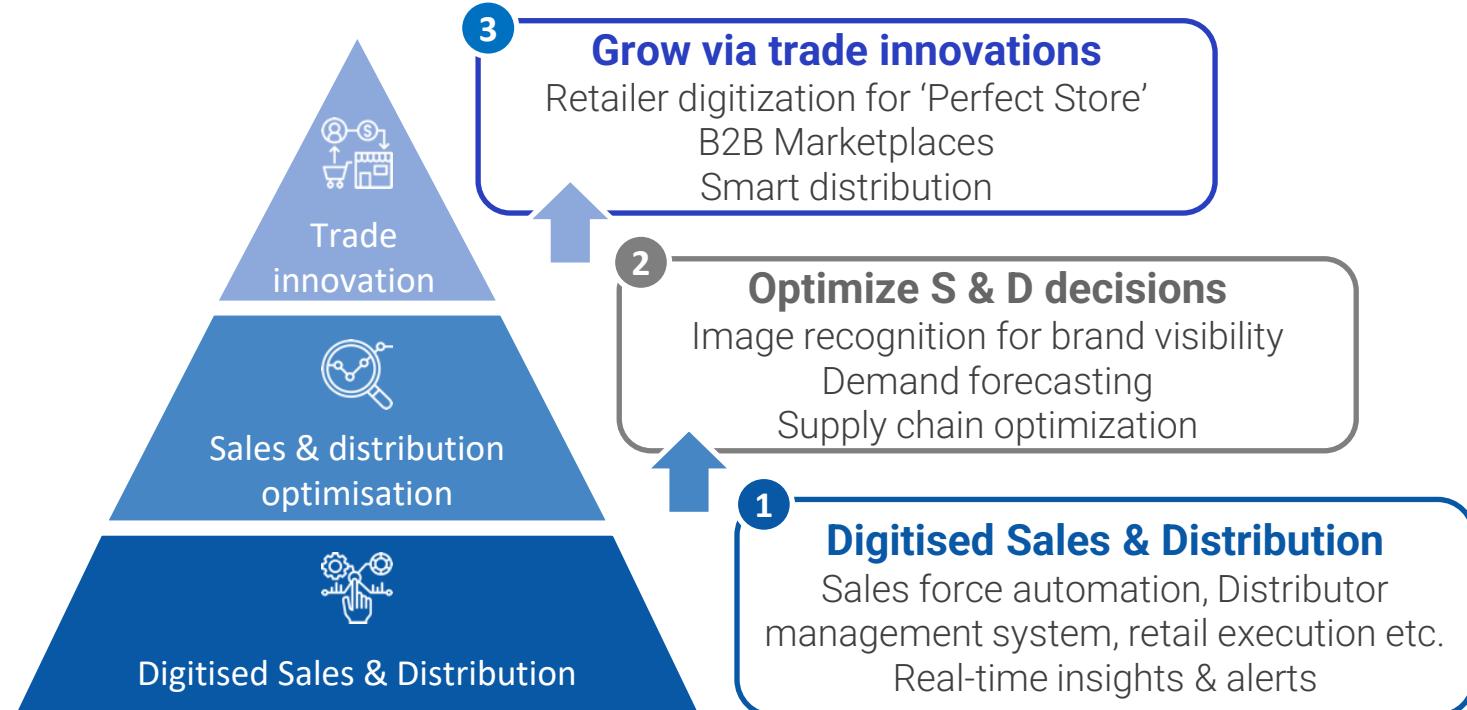
**Sales Force**  
(8% - 10%)

**Logistics**  
(6% - 8%)

# BIZOM is the Retail OS for the Emerging Markets

BIZOM enables Brands to distribute smartly and efficiently by utilizing power of technology and data analytics

**Digitizing & Optimizing the Brand's 4Ps along with its People**



A photograph of a grocery store aisle filled with various brands of yogurt and dairy products, creating a dense, colorful background.

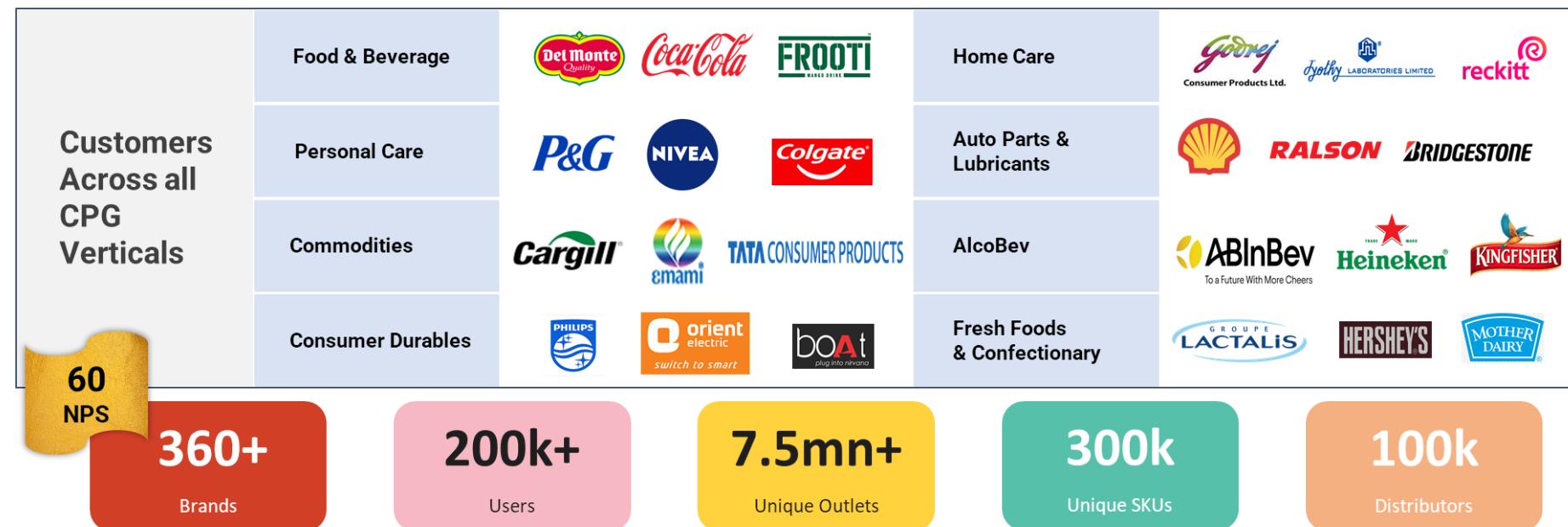
**Our Story in 3 Acts,**

**Act 1:**  
**Capturing Voice and Becoming Champion Digital  
Transformation Partner for Major CPG Enterprises**

# With Digitization, We are Each Brand's & India CPG's Single Source of Truth (Capturing 50mn CPG Transactions/Day)

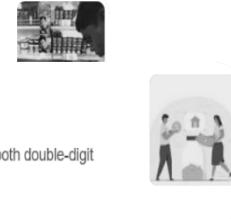
Digitised Sales & Distribution

-  Retailer Automation
-  Salesforce Automation
-  Distributor Automation
-  Integrated Platform
-  Back office management

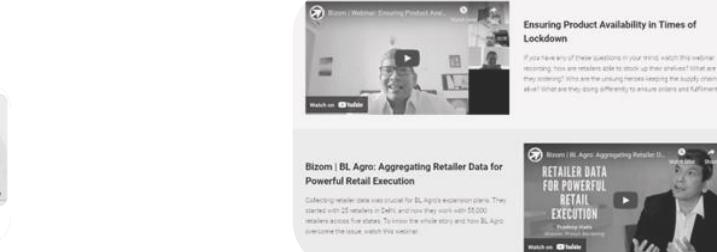


## Bizom Instrumental in Driving Industry's Narrative with Insights from Ring Side View to India CPG

BS Business Standard  
Rural demand for FMCG products nears positive territory i...  
In Bizom's data for 1st half month-on-month  
Household financial savings at 30-year low  
The fall in volumes was sharper in rural markets at 3.6% led by both double-digit price increases and lower unit growth. Data from Bizom...  
5 days ago



Referenced by All Major Business Publications



Evangelizing Tech-Led Perfect Retail Execution



Only Source with Real Time Insights

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# Preferred Partner for Enterprise RTM Digitization in Emerging Markets

*Winning Against Entrenched Incumbents Overriding Complex Change Management Protocols*



**BIGGEST CHALLENGER** of Legacy, Modern and Internal RTM Digitization Solutions

**TOP OF MIND** Product for all Companies Evaluating Digital Transformation

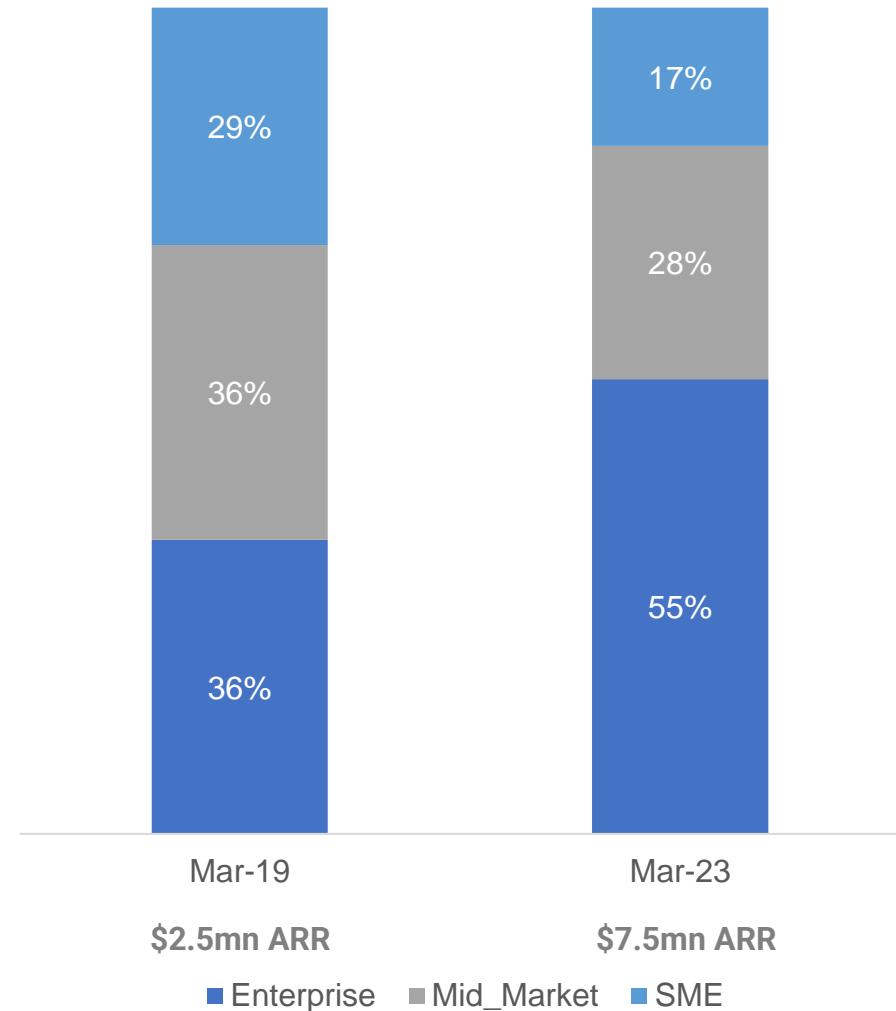
**Empanelled as a Preferred Partner** for our Clientele's International BUs

**Our Winning Proposition:** Business Critical Workflows Built on **Strong Data Moats**

# Efforts Show in Results

*Successful Enterprise Focus  
Transformation over the last 3 years*

**1.5x growth in Enterprise Account Revenues**



**4.5x**  
Growth in Enterprise  
Landing ARR  
2019 vs 2022

**~0%**  
Enterprise Monthly Churn

## Act 2: **Insight Enriched Automation & Optimization with Modular Expansion on Top of Digitization**

# We are Helping Traditional Brands and Brands of Tomorrow Optimize Omnichannel Capabilities



# Super Sizing Accounts with KAM based GTM; Superior Economics

Cumulative Return on CAC\*

USD (000s)

282

232

182

132

82

32

-18

ROI

**3x**

M36

**49x**

M36

**41x**

M21

**116x**

M36



Average Account Profitability | Account Profitability Godrej | Account Profitability ABInbev | Account Profitability Shell

\*Graph Limited to M36 for Illustration Purposes

Blue Coloured Icons – Current and Ongoing

Grey Icons – High Potential

## Sample Expansion Story + Potential



Landed: Oct'21 @ \$33k ARR

ABInBev India

Current ARR: \$230k

Potential ARR: \$1.4mn

### Relevant Modules



### Potential Geographies



Vietnam



APAC



Africas

# ....And we have built this network with strong business fundamentals!

81%

Gross Margin

-3.3%

Revenue churn

125%

Net Dollar Retention

6.2x

LTV:CAC Ratio

26

months

Breakeven Period



**Landed: Sep'18 @ \$3.3k ARR**

Godrej – currently 6 BUs

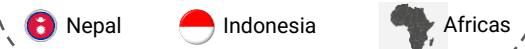
**Current ARR: \$331k**

**Potential ARR: \$1.2mn**

#### Relevant Modules



#### Potential Geographies



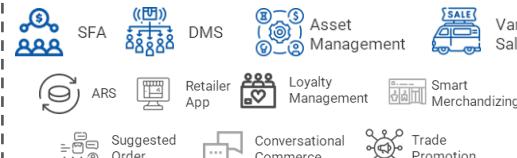
**Landed: Jun'18 @ \$3k ARR**

West & North India Bottling Co's

**Current ARR: \$160k**

**Potential ARR: \$2.1mn**

#### Relevant Modules



#### Potential Geographies



**Landed: Jun'15 @ \$25k ARR**

Hershey's India

**Current ARR: \$120k**

**Potential ARR: \$1.5mn**

#### Relevant Modules



#### Potential Geographies



8x

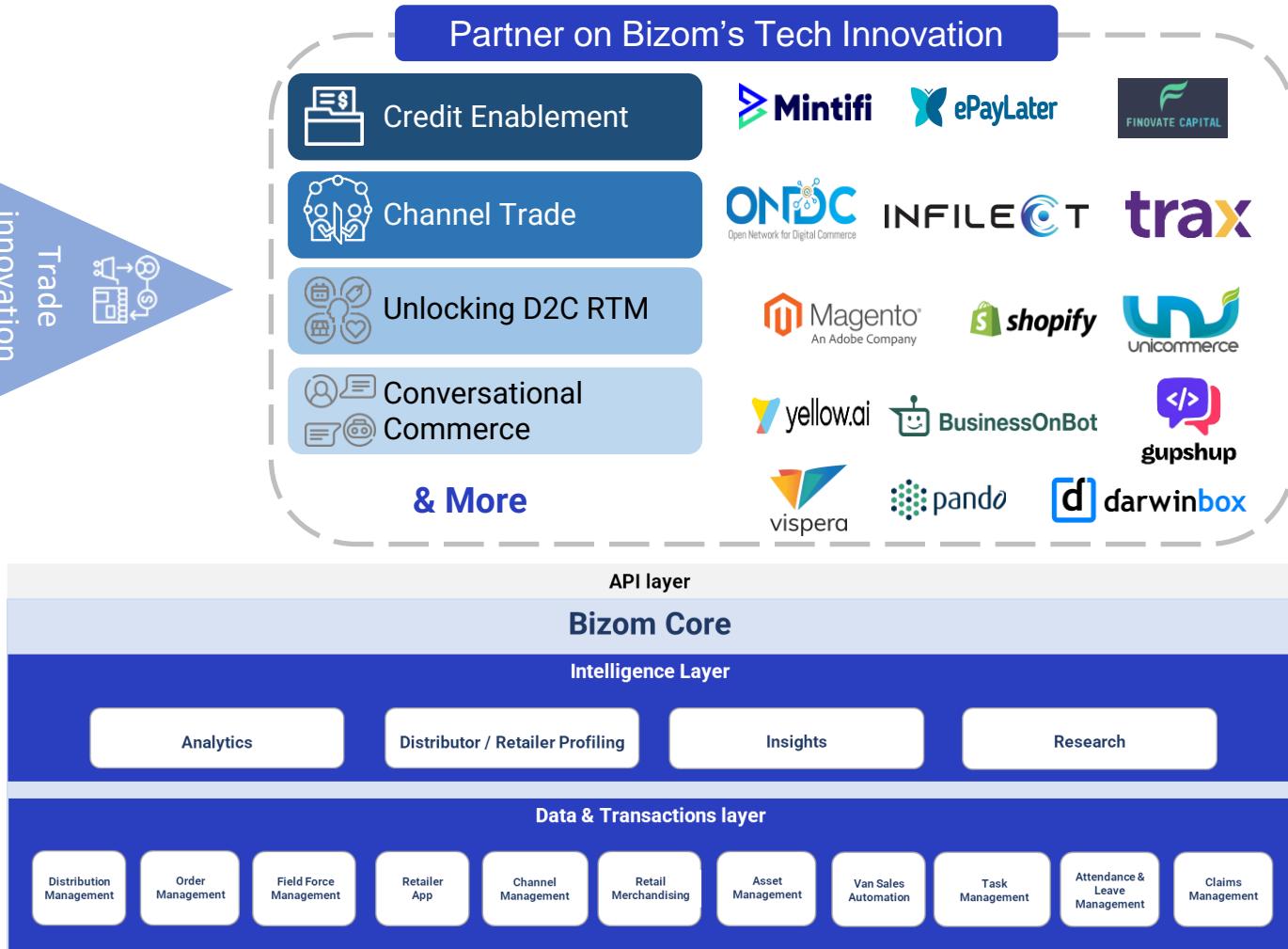
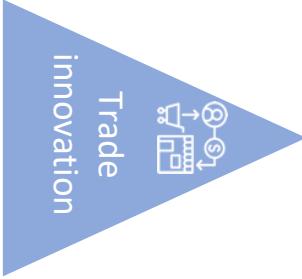
Average M24 Enterprise Account Size

4x

Average M24 Mid-Market Account Size

# Act 3: Perfect Execution of RTM and Future of Retail

# Full Retail Commerce Cloud with Trade Innovation Products



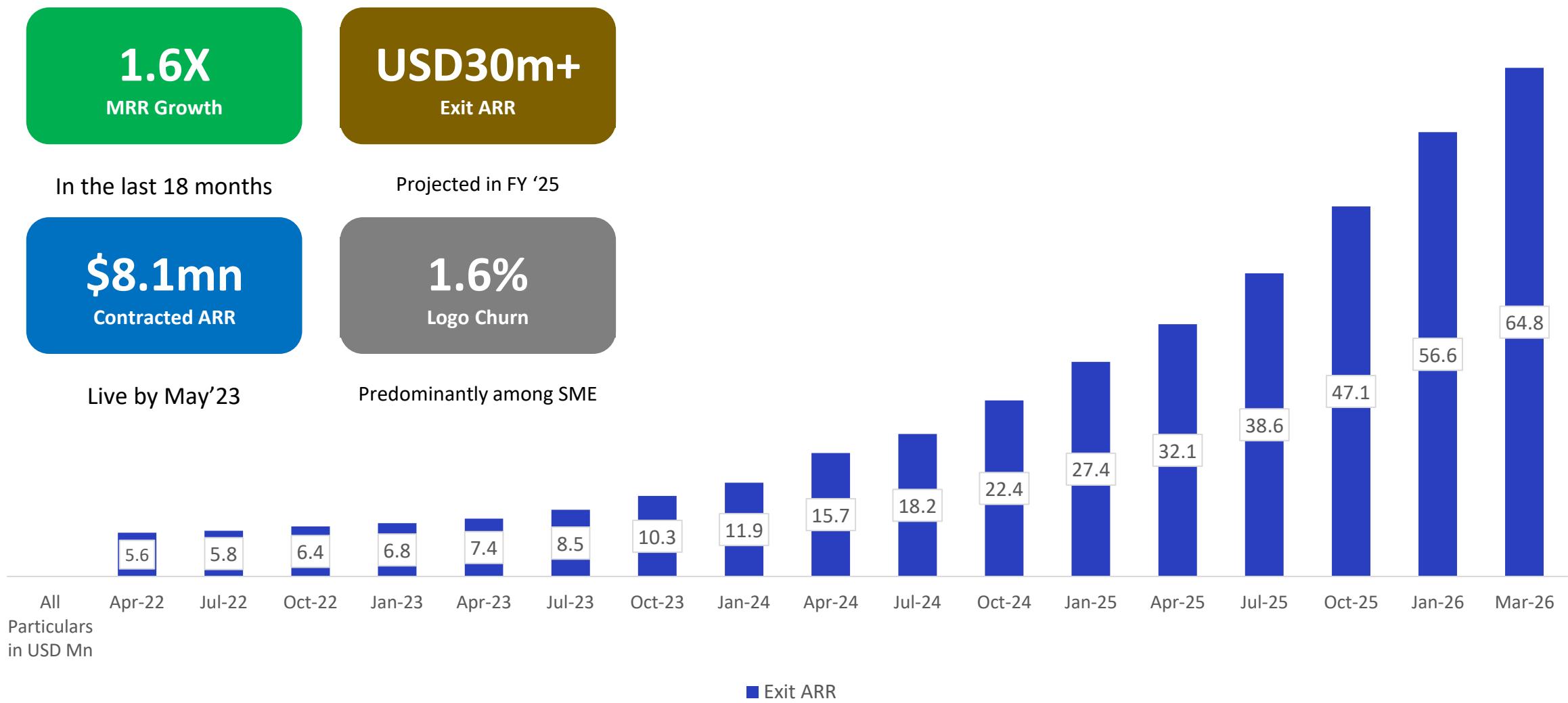
Build Walled Garden Around Brand's Tech Stack With Gatekeeping Advantages

Successful Pilots with Forward Thinking Brands



# Growth & GTM

# Growing with Full Pipeline, comfortably on track to be \$60mn+ ARR by FY26



Conversion Rate: 1 USD = INR 80

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# Our GTM to be a USD 50mn ARR Company

Expand Width



**New Logo Acquisition**  
Across Enterprise, Mid-markets, SMEs & emerging markets



**Expand Verticals**  
Pharma OTC, Fashion, Medical Devices



**Expand Geographies**  
SE Asia, Middle East, North Africa & Mexico

Expand Depth



**Enabling Intelligent Services**  
Modular Expansion across Accounts:  
Credit Enablement, Optimizations,  
AI/ML Merchandizing



**Expand Geographies**  
Enter BUs of Existing Logos in Multiple Markets



Sales Force  
Automation



DMS & RA



Analytics &  
Optimization



**Increased MRR**



**Improvement in  
Retention**



**Higher Net Dollar  
Retention**

Already Present in 30+ Emerging markets (10% of ARR)



# Experienced founders & strong operating 2<sup>nd</sup> line



**Lalit Bhise**

*Co-Founder & CEO*



Invented hybrid mobile programming,  
patent in visual merchandising using  
image recognition.

Indian FMCG expert having worked with  
market leaders for 10 years.



**Shree Kulkarni**

*Co-Founder & Head of  
Customer Success*



Expertise in project control with large  
enterprises.

In and out knowledge of FMCG  
ecosystem by working with many brands  
for past 10 years.



**Vasudeva M**

*Co-Founder & CPO*



Built world's first mobile based  
healthcare system.

Has been building great tech teams  
and products for past 15 years.



**Akshay D'Souza**

Head of Insights & Growth



**Nikhil Chhaochharia**

Head of Engineering



**Krishna Kothari**

UK – CEO & Sales Head



# Algorithmic Jugaad Scaling



## Backup: Business data

# ..We are Casting our Nets across the Brands of Emerging Markets

BIZOM is Orchestrating a “*Surround and Conquer Strategy*” to dominate the Digital Journey of Consumer Brands

# of Target Brands (Ent. & Mid-market)

**3,076**

**TAM  
of  
\$1.8Bn**

W.Avg Size of Accounts

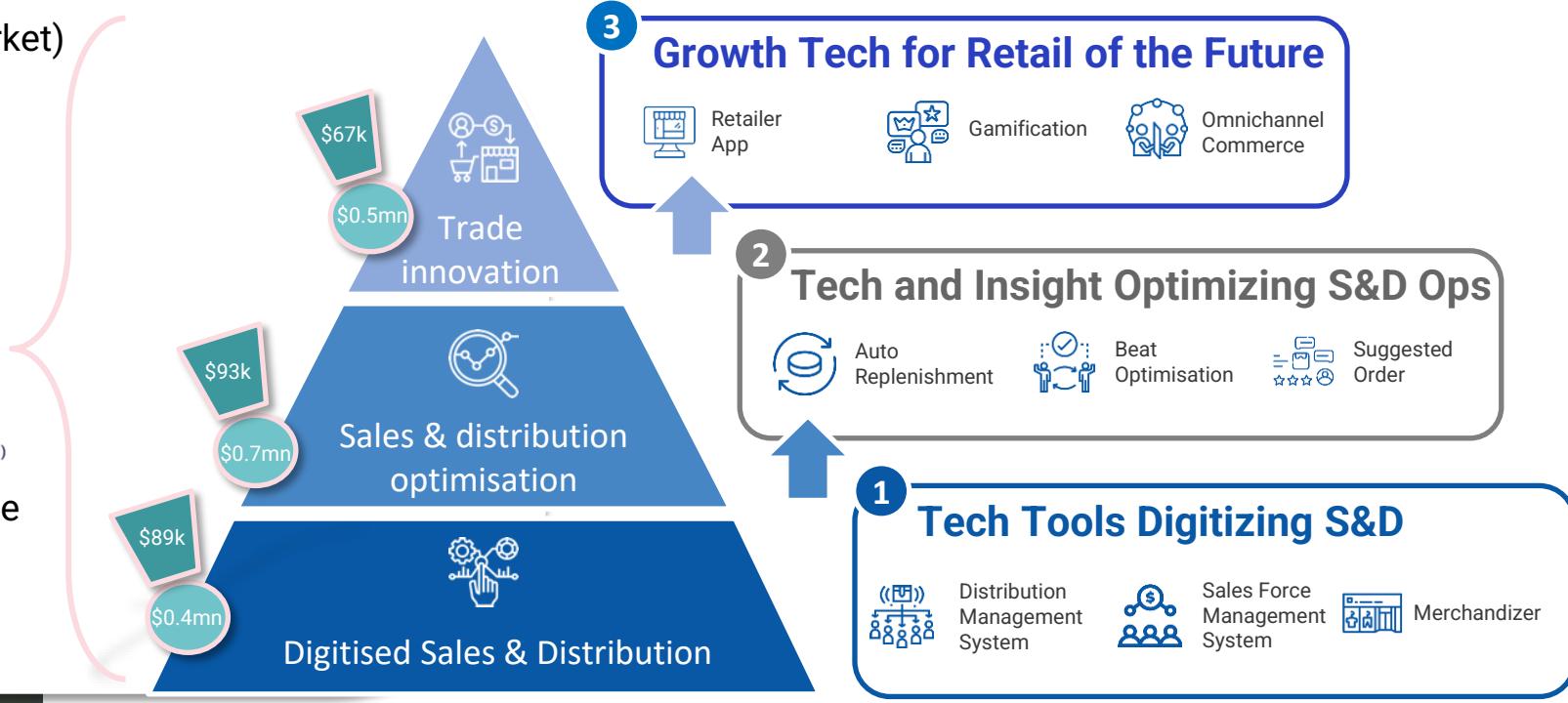
**\$0.6mn**

\$1.6mn Average Enterprise Account Size (Potential) \$250k Average Mid-Market Account Size (Potential)

W.Avg Share of Target's Revenue

**0.3%**

**In India Alone!**



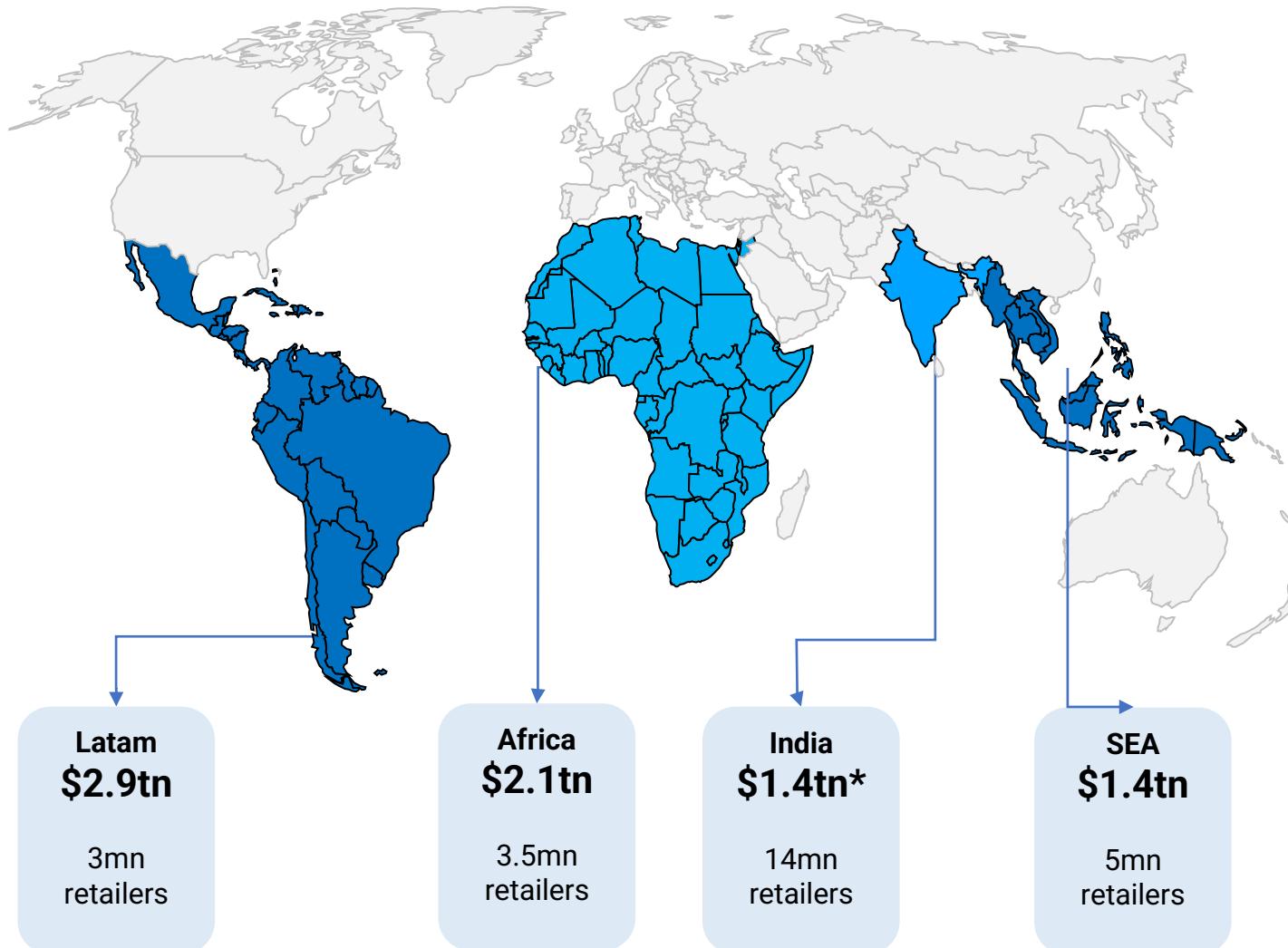
**\$1.6mn**

Average Enterprise Account Size (Potential)

**\$250k**

Average Mid-Market Account Size (Potential)

# Emerging Markets continue to be Pie in the Sky for Global CPG



## Promising Market

- 25mn+ Mom & Pop Stores
- Very Little Penetration by Global CPG



## High Entry Barriers

- High Cost to Service
- Difficult to Penetrate



## Ready to Ride the Wave

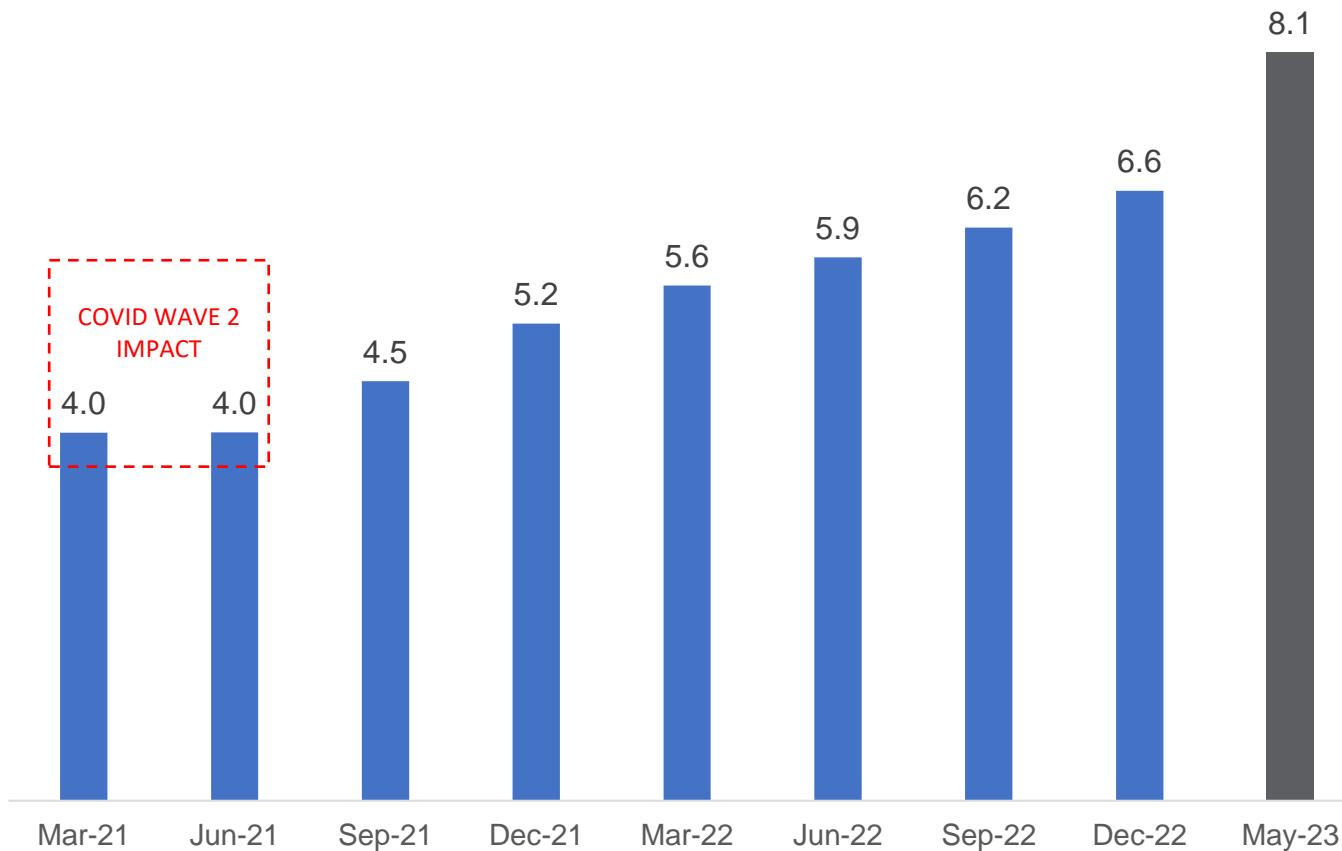
- Smartphone and Digital Payment Apps already adopted



## New Platforms Taking Lead

- Amazon and Alibaba already luring these stores to join their platform

# Growing with full pipeline and our contracted MRR is ~ USD 0.8m



**USD 9.1m**  
Contracted ARR

**10%**  
International  
Customer Base

**360+**  
Active Customers

**1.6%**  
Logo Churn Rate

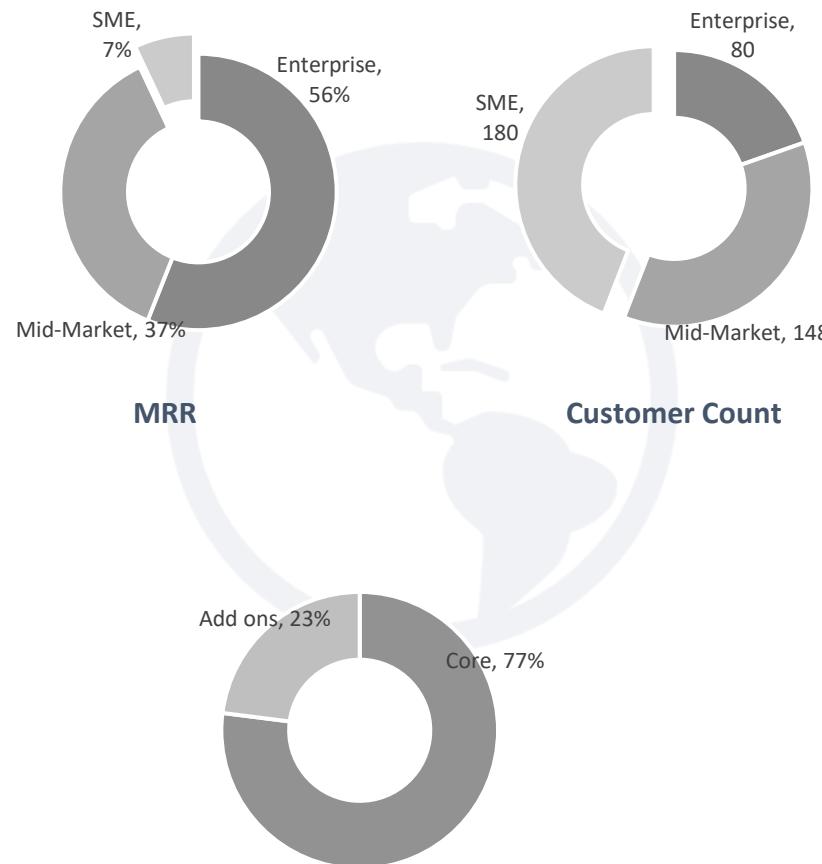
**USD 18k**  
Avg. ACV

**6.2x**  
LTV:CAC

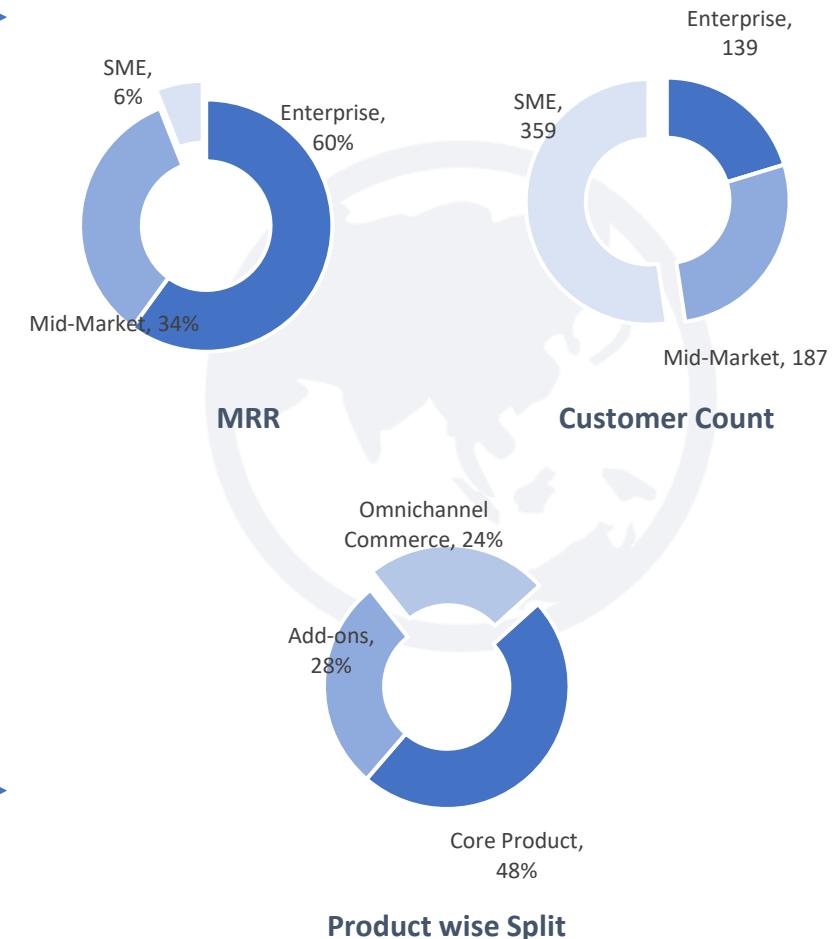
# Glance at Bizom in March 2027

Exit ARR  
USD 145m

## International Breakdown



## India Breakdown



■ India ■ International

# Our Platform has Enabled Great Outcomes for Customers



**113%**  
Increase in drop-size



**86%**  
Channel/Distributor Fill  
rate



**~3M GBP**  
Incremental sales within 9  
months of implementation



**90%+**  
Visibility in rural operations  
within 6 months



**24 Hours**  
Guaranteed delivery time from  
initial 4 days



**60%**  
Reduced Stock ageing at  
outlets



**2x**  
Presence in 150k outlets



**25%**  
Growth in MBOs

# We are Rated Highly by Customers, Users and Peers

**Deloitte.**

**500**

Technology **Fast 500**  
2019 APAC **WINNER**



[Press Release: Deloitte](#)

[Top 100 Fastest Growing Company in APAC](#)



[NASSCOM Emerge 50 2021](#)



CII Centre for Digital Transformation  
The Most Innovative Best Practice  
-Sales Force Automation

[Dx Awards - 2022](#)

**Bizom Reviews**

by Mobisy Technologies in Customer Relationship Management - Others

4.6 ★★★★ 206 Reviews

[Gartner Peer Reviews](#)

## Brand Testimonials

*"Bizom's gamification really helped us achieve all our strategic objectives. All our KPIs were met and even exceeded"*



*"Today ,with Bizom, India has become a benchmark - regionally & globally.....We are way ahead of what other markets are doing or thinking about"*



## Gartner Peer Reviews

*The transparency and enthusiasm by the team in ensuring how much we can have a hands-on experience of the solution was an exceptional experience for me*

**-Program and Portfolio Analyst, \$10Bn-\$30Bn company**

*They have a very strong product which covers entire sales hierarchy down to the retailers. It has given complete visibility on entire business & how our products are faring in the market right from product placement to performance*

**-Analyst, \$10Bn-\$30Bn company**

## App Reviews

*Bizom makes works easy and we can track data, This product is helping end to end for their users ,easy to track the retailer salesman details (and) data.*

**-Parameshwar Biradar**

*Lite, user friendly, a platform for companies to monitor their sales force. No more order taking on pen and paper, you can free yourself from manual reporting. Bizom is a complete package in terms of Sales force automation*

**-Vinay Kumar**

# Strategic advisors and impactful board

## Strategic Advisors



Ashok Dhingra  
**Strategic Advisor**



Sridhar Turaga  
**Strategic Advisor**



o2s<sup>360</sup>



Natarajan Ranganathan  
(Nats)  
**Strategic Advisor**



Foundation Partners  
RNT Capital

## Large & Sustainable Investors



# Backup: Expansion

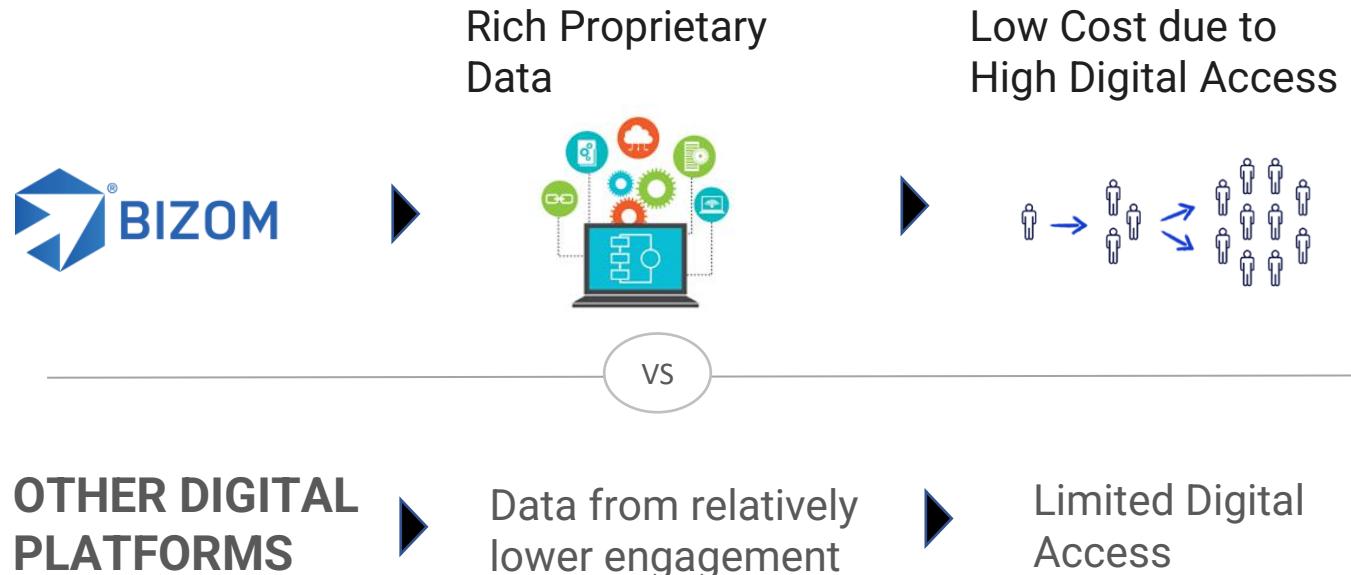
# Best Positioned LSP\* for Digital Lending to CPG Intermediaries

## DIGITAL LENDING to Grow 10-15x



1. Banks & FI's Unable to meet Credit Demand due to Non Availability of Data and High Processing Cost
1. 40% SMB forced to Borrow from Informal Sector at 2-2.5x Interest Rates

Source: Omidyar Note: \*Loan Service Provider



Bizom is perfectly positioned to Enable Lenders by providing rich proprietary data for credit underwriting

Customer



**BRIDGESTONE**

Credit partner



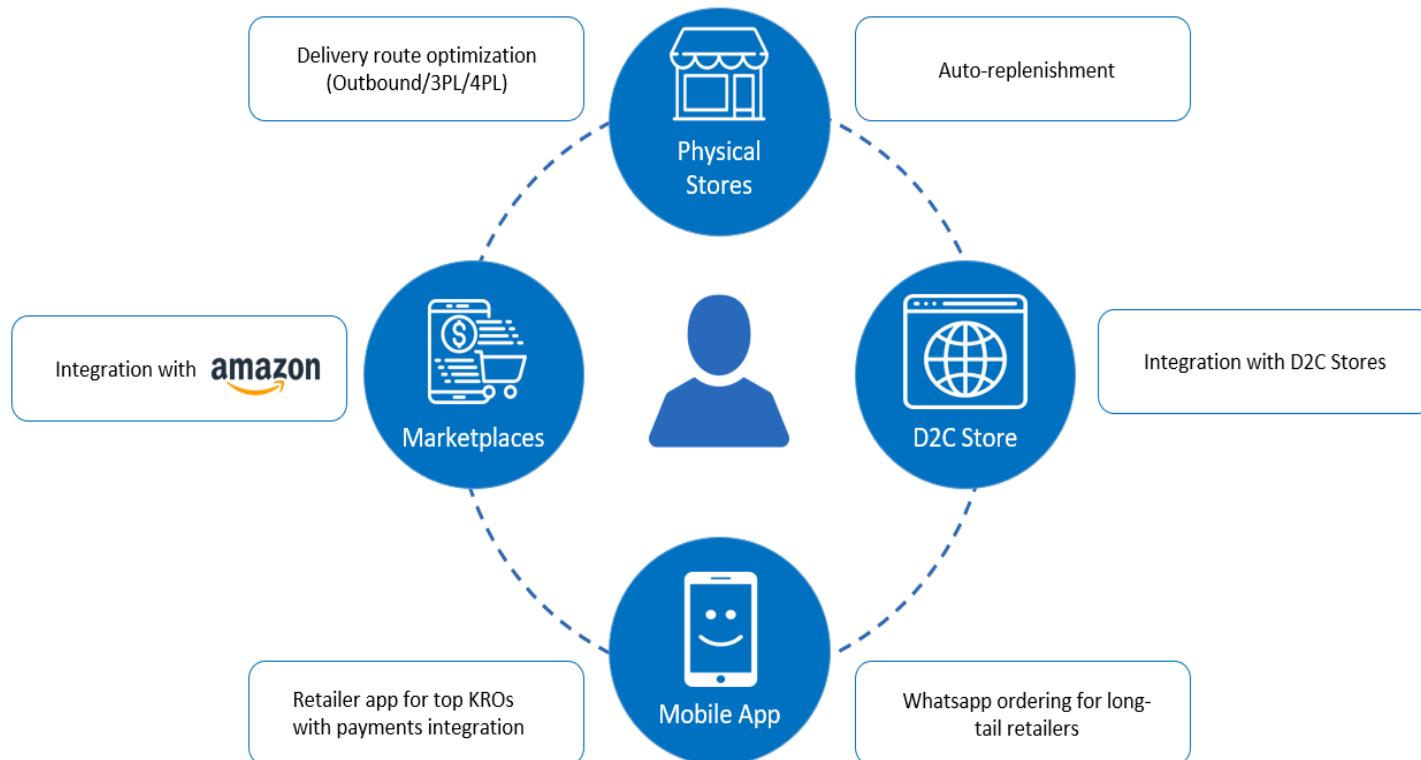
# We are Helping Traditional Brands Build Omnichannel Operations

We are helping brands conceptualize, create, and deploy omnichannel operations

Unlocking the potential of ONDC for Customers



TATA CONSUMER PRODUCTS



Roles one can play on ONDC

## Connect Buyers to the Network

Get buyers to use your interface to purchase goods and services from any ONDC registered seller

## Connect Sellers

Create apps through which merchant / seller can list their goods and services and do business by interacting with buyers

## ONDC Gateway

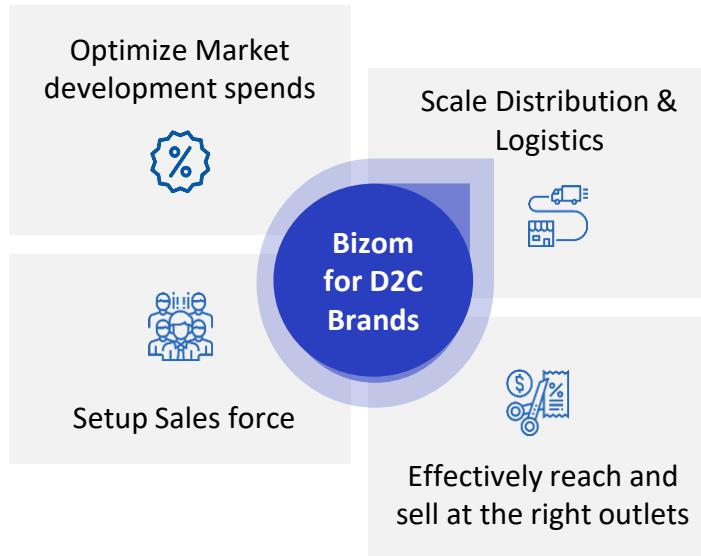
Show the search query received from buyer-side app to all seller-side apps, based on location, domain, etc

## Technology Services

Provide software and other technical add-ons for the first three roles

# We are helping D2C & Emergent Brands Build Offline Capabilities

D2C brands are leveraging Bizom to effectively scale up the GT channel



**54K+** Outlet Reach in 6 Months

**60%** Sales Increase in 3 Months

**91%** Increase in Category Placement (Haircare)



**40K+** Outlet Reach in 6 Months

**250** GT users scaled in 2 months

**58%** Growth in sales in 6 months

# We have Landed and Expanded with Indian and Global Enterprises



**epigamia**



**PHILIPS**

- **Landed:** India
- **Geo Expansion:** India



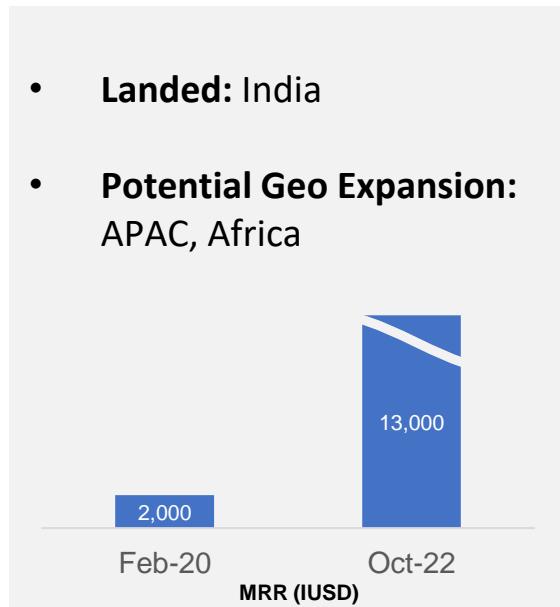
- **Landed:** India
- **Geo Expansion:** India



- **Landed:** India & SE Asia
- **Potential Geo Expansion:** 10 Markets



- **Landed:** India
- **Potential Geo Expansion:** APAC, Africa



*Substantially increasing scale-up velocity and volume with every cohort*

# Key Pillars of our Width Expansion

New Logo Acquisition	Key Accounts	Vertical Expansion	Geographic Diversification
<p>Scaling up Sales Force in India &amp; Global</p> <p>Leveraging scalable product with PMF across geographies</p> 	<p>Target SIX \$1 Million ARR accounts in 18 months</p> <p>Pipeline for 12 potential million dollar accounts already in place</p> 	<p>Expanded into new verticals such as <b>Automotive, Medical Devices, Fashion</b></p> <p>Deepening presence to build leadership in FMCG, AlcoBev, Dairy, Lubricants</p> 	<p>Deepening presence to acquire &amp; scale leading local brands across EM</p> <p>Winning in large EMs: Indonesia, Malaysia, Vietnam, Nigeria, South Africa, Kenya, Egypt, Bangladesh</p> 

# Key Pillars of our Depth Expansion

Proven Traction

## Userbase Expansion

Scaling up adoption across Sales Force in India & Global

Instituting campaigns for adoption among each account's available userbase



## Key Accounts Farming

Target adjacent Business Units to turn accounts into \$1mn+ Logo

Potential for 15+ \$1 mn+ accounts among current customers



## Module Expansion

Drive Strong Customer Success led module expansion with existing accounts

### Key Modules Developed



Sales Force Automation



DMS & RA



Analytics & Optimization



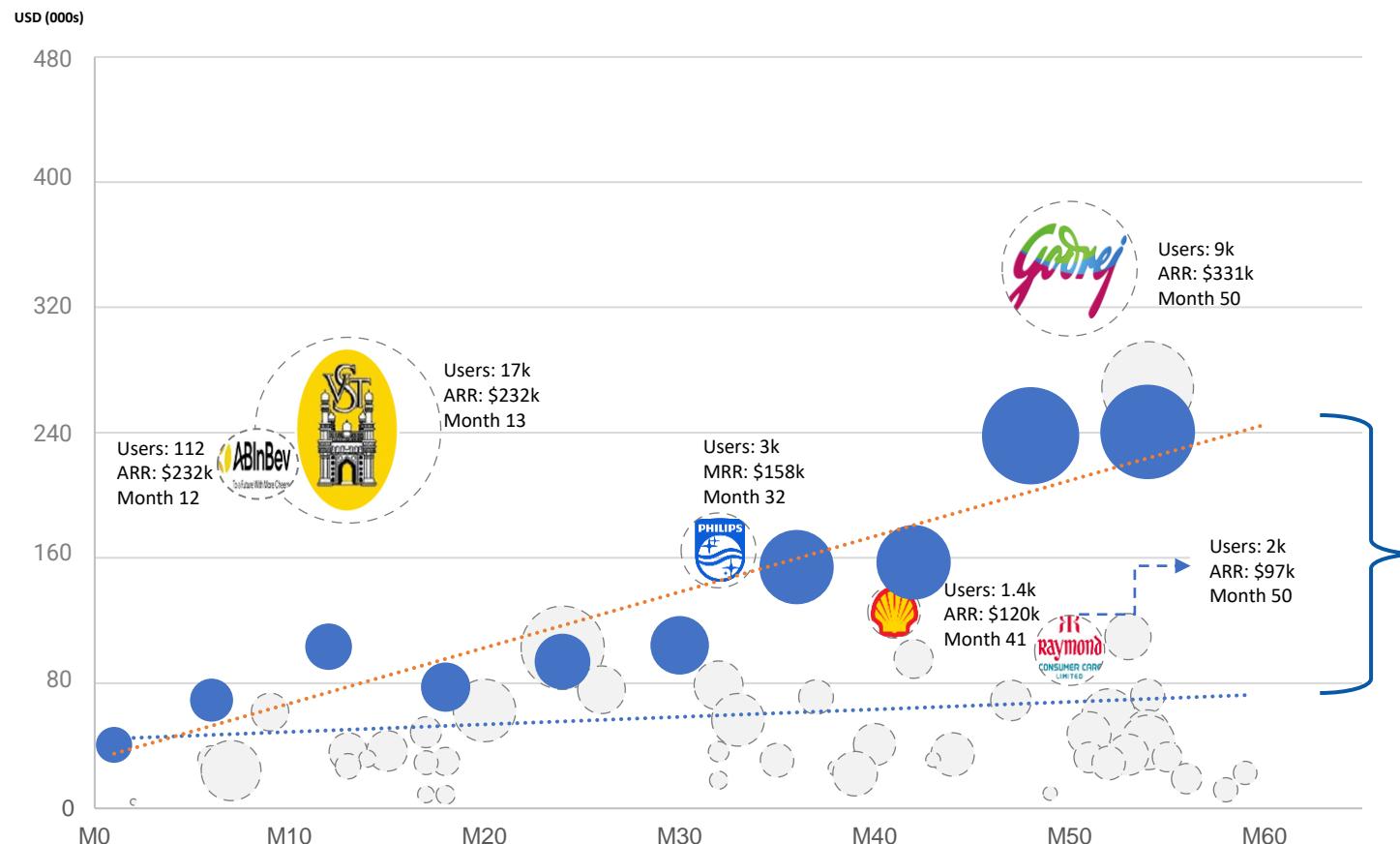
## Geographic Expansion

Deepening relationship to expand geographically with existing accounts across EM

Well Positioned for success in: Indonesia, Malaysia, Vietnam, Nigeria, Africas, Kenya, Egypt, Bangladesh



# Strong Potential for Depth Expansion with existing accounts



## Legend

- a) X – Axis -> Aging of customer
- b) Y – Axis -> MRR (\$ 000s)
- c) Size of Bubble -> User count
- d) Dark Blue Circles -> Monthly MRR Avg of Select Ideal Accounts (7 accounts)
- e) Grey Circles -> Enterprise and Midmarket Accounts with Bizom

## MRR Expansion within existing accounts



# Backup: Competition

# We stand out among our competition



## 1. Only Integrated Player

Bizom is the only integrated player in the market providing brands with end-to-end automation as well as insights

## 2. Customizable solutions

Bizom customizes solutions as well as insights as per brand requirements targeting specific problems and optimizing to the maximum potential.

## 3. Multi-Brand Insights

With a huge data set available, Bizom is able to provide brands with multi-brand driven insights driving each brand to optimize its potential