

OptiU B2C Strategy Document

Democratizing Autonomous Optimization for Everyday Users

1. Introduction: Filling the Market Void

Artificial Intelligence has entered homes and offices through ChatGPT-like tools. These systems are conversational, descriptive, and useful, but they do not compute the **optimal decision under uncertainty and constraints**.

OptiU's **Autonomous Optimization Models (AOMs)**, powered by **Reinforcement Learning Automation (RLA)**, fill this gap. They solve problems like:

- *"What's the best budget split for my household while staying under \$5,000/month?"*
- *"Which supplier mix minimizes cost but reduces risk exposure?"*
- *"Which sales territories maximize bookings without overloading reps?"*

Unlike GenAI, AOMs provide **prescriptive, closed-loop optimization** with dashboards, trade-off explanations, and re-optimization when conditions change.

This creates a **B2C subscription market** where individuals, professionals, and households adopt optimization first for personal benefit — then pull OptiU into enterprises for 6–9 digit annual licenses.

2. Core Offerings

2.1 Life Optimizer – Household Segments

Households differ by **income, spending power, and complexity of decisions**. The Life Optimizer tiers are designed to match perceived ROI.

| Household Class | Monthly Fee | Limits | ROI Potential | Example Use Cases |
|--|-------------|--|-----------------------------|--|
| Budget-Conscious Families (Income <\$75k) | \$50 | Up to 20 optimizations/month | \$100–\$200/month savings | Grocery planning, commuting optimization, utility bill balancing |
| Middle-Class Families (Income \$75k–\$150k) | \$100 | Up to 50 optimizations/month | \$300–\$600/month savings | Vacation planning, weekly meal optimization, kids' activity scheduling |
| Affluent Households (Income \$150k+) | \$200 | Unlimited optimizations + auto-updating dashboards | \$1,000–\$3,000/month value | Global travel itineraries, private schooling logistics, financial planning, fitness scheduling |

🔑 **Value Proposition:** Every family tier perceives ROI proportional to their spending. A \$200 subscription for a high-income household is negligible compared to the thousands saved in time, travel, and financial waste.

2.2 Professional Optimizers – Persona-Based AOMs

Each professional persona represents a **class of jobs** with high reliance on spreadsheets. They are willing to pay personally (or get employer reimbursement) because ROI is immediate.

Persona 1: CFO / FP&A Optimizer

- **Target:** CFOs, FP&A analysts, finance managers.
- **Pain:** Budget allocation, cash flow scenarios.
- **Tiers:**
 - \$150: 20 runs/month, simple allocations.
 - \$300: 75 runs/month, scenario library.
 - \$750: Unlimited, auto-updating dashboards.
- **ROI:** \$50k–\$1M+ annual uplift by reallocation.

Persona 2: Revenue Ops Optimizer

- **Target:** Sales operations managers, RevOps consultants.
- **Pain:** Territory design, quota setting.
- **Tiers:** \$100 / \$250 / \$500.
- **ROI:** +8% bookings; \$25k–\$250k/month incremental revenue.

Persona 3: Sales & Pricing Optimizer

- **Target:** Sales directors, deal desk leads.
- **Pain:** Price ladders, competitor simulation.
- **Tiers:** \$150 / \$300 / \$750.
- **ROI:** \$50k–\$500k/month margin lift.

Persona 4: Marketing Optimizer

- **Target:** CMOs, campaign managers.
- **Pain:** Channel spend, campaign ROI.
- **Tiers:** \$100 / \$250 / \$500.
- **ROI:** +11% ROI on campaigns; \$10k–\$200k/month value.

Persona 5: Product Manager Optimizer

- **Target:** PMs, startup founders.
- **Pain:** Roadmap prioritization, backlog sequencing.
- **Tiers:** \$75 / \$150 / \$300.
- **ROI:** 20% faster throughput; \$50k–\$200k/year equivalent productivity.

Persona 6: Manufacturing Ops Optimizer

- **Target:** Plant managers, schedulers.
- **Pain:** Shift rosters, sequencing.
- **Tiers:** \$150 / \$300 / \$600.
- **ROI:** +6% throughput, –12% overtime; \$100k–\$1M/year.

Persona 7: Logistics Optimizer

- **Target:** Logistics managers, consultants.
- **Pain:** Carrier mix, routing, CO₂ trade-offs.
- **Tiers:** \$100 / \$250 / \$500.
- **ROI:** -8% line-haul cost; \$20k–\$500k/month.

Persona 8: Procurement Optimizer

- **Target:** Procurement leads, sourcing analysts.
- **Pain:** Supplier scorecards, risk trade-offs.
- **Tiers:** \$150 / \$300 / \$750.
- **ROI:** 30% supplier risk reduction, cost optimization; \$50k–\$1M/year.

Persona 9: Healthcare Ops Optimizer

- **Target:** Hospital schedulers, operations directors.
- **Pain:** OR scheduling, bed allocation.
- **Tiers:** \$200 / \$400 / \$800.
- **ROI:** +8% throughput; millions in reduced wait times and optimized staff usage.

Persona 10: Public Sector / City Planner Optimizer

- **Target:** Municipal planners, consultants.
- **Pain:** Capital planning, EMS routing.
- **Tiers:** \$150 / \$300 / \$600.
- **ROI:** 11% faster EMS response; tens of thousands saved monthly.

3. Market Size & Ramp-Up

US Market (2026–2028)

- **Households:** 60M targetable; 1–2% penetration = 600k–1.2M subs.
- **Professionals:** 15M+ spreadsheet-heavy roles; 2–3% penetration = 300k–450k subs.

Global Market (2026–2028)

- **Households:** 300M+ targetable; 0.5–1% penetration = 1.5M–3M subs.
- **Professionals:** 80M+ roles; 1–2% penetration = 800k–1.6M subs.

4. Pricing, ROI, and Revenue

- **Life Optimizer:** \$50–\$200 tiers.
- **Professional Optimizers:** \$75–\$800 tiers depending on persona ROI.

Revenue Projections

| Year | US Revenue | Global Revenue | Total |
|------|------------|----------------|--------|
| 2026 | \$150M | \$300M | \$450M |
| 2027 | \$600M | \$1.2B | \$1.8B |
| 2028 | \$1.5B | \$3.2B | \$4.7B |

5. Strategic Differentiation

- **Not GenAI:** AOMs are prescriptive and autonomous; GenAI is descriptive.
- **Persona-Based Pricing:** Every optimizer is tailored to the *value capture* of its user class.
- **Trojan Horse:** Households and professionals adopt first → they become the **proof engine** for enterprise-scale adoption.

6. Conclusion

OptiU B2C is more than consumer software — it's the **gateway to enterprise dominance**.

- **Households** see real savings and lifestyle improvements.
- **Professionals** see immediate ROI and productivity lifts, justifying subscriptions out of pocket or via employer reimbursement.
- **Enterprises** are pulled in as employees validate OptiU's value.

By 2028, OptiU B2C subscriptions alone can generate **\$4B–\$5B annually**.

Most importantly, this subscription model **creates the perfect funnel into enterprises**. As individuals and professionals adopt AOMs in their daily lives, they naturally validate OptiU's value inside their companies. Employees bring dashboards, optimized plans, and measurable ROI into team meetings, showing tangible results that traditional tools cannot deliver. This bottom-up adoption lowers enterprise sales friction, accelerates trust-building with decision makers, and ensures that by the time OptiU enters formal B2B discussions, organizations have already experienced the power of AOMs firsthand.

In this way, B2C subscriptions don't just generate billions in recurring revenue — they act as **strategic proof engines** that pave the way for 6–9 digit enterprise licenses across energy, manufacturing, healthcare, finance, logistics, and beyond.