ChatGPT

Reportr Deep Dive and Pitch Deck Research

Market Opportunity and Pain Points

Manual Documentation Burden: Professionals across finance, consulting, sales, and healthcare spend significant time on meeting notes and compliance paperwork. In financial advisory, recent studies confirm that administrative tasks are consuming more time than ever, and "compliance is the top stressor for advisers" [1] . Regulatory reviews have even found record-keeping gaps in most advisory files [2] , underscoring the risk of inconsistent documentation. This problem isn't limited to finance – virtually every client-facing industry faces **knowledge loss** and follow-up delays when meeting notes are incomplete or delayed.

Time Lost and Quality Issues: A single advisor or consultant can lose **5-10 hours per week** on writing up meeting notes and reports [3] . This not only cuts into time that could be spent with clients or on billable work, but it also introduces variability in quality. Without a systematized solution, one meeting might have detailed notes while another has sparse details, leading to knowledge gaps. The pain is universal: 62% of Otter.ai users reported saving at least 4 hours a week by automating note-taking [4] . This highlights the *huge productivity upside* if documentation can be automated.

Compliance and Consistency: In regulated fields (financial services, healthcare, legal), poor documentation isn't just an inconvenience – it's a liability. Advisers in New Zealand and Australia have faced increased regulatory scrutiny on record-keeping [2] . For example, in wealth management, failing to document a client's instructions or a disclosure can lead to compliance breaches. A tool that **standardizes meeting records** provides not only efficiency but also a compliance safety net. Reportr addresses this by generating structured, professional reports from meetings, ensuring important details aren't lost and every meeting yields an auditable document. This directly tackles the **knowledge loss** problem – important insights are captured and easily searchable later.

Market Size: Focusing initially on financial advisers gives Reportr a strong beachhead. Australia alone has about **15,500 registered financial advisers** as of 2025 [5] , and the UK has on the order of **25,000+ financial advisers** [6] (not to mention thousands more in New Zealand). Globally, millions of professionals conduct client meetings daily. The *conversation intelligence* and AI note-taking market is booming – forecast to reach **$18.4 billion by 2026**, up from $6.8B in 2021 [7] . The surge of remote work and virtual meetings during the pandemic has only expanded this opportunity. Every virtual meeting became a channel for AI note-takers, as seen by Otter.ai's explosive growth to 25 million users and $100M ARR by 2025 [8] [9] . In short, **the need for automated meeting documentation is large and growing**, and Reportr is positioned to capture a slice of this significant market by solving a painful, ubiquitous problem.

Competitive Landscape and Differentiation

The landscape for AI-driven meeting documentation can be grouped into three categories: **general-purpose transcription tools**, **sales-focused conversation intelligence platforms**, and **industry-specific solutions**. Below we outline key players and how Reportr differentiates:

- **General AI Notetakers (e.g. Otter.ai, Fireflies.ai, Zoom's AI Companion):** These are broad tools that join meetings to transcribe and summarize discussions. Otter.ai is a prime example, boasting over 25 million users and an estimated $100M in annual recurring revenue [10] [9]. Otter's *OtterPilot* bot integrates with Zoom/Teams/Meet to provide live transcripts and post-meeting summaries [11] [12]. It even offers an AI chat feature to answer questions from the meeting transcript [13]. **Reportr's edge:** Unlike generic notes from Otter, Reportr focuses on *customizable, professional reports*. Users can define templates for different meeting types or industries, ensuring the output "resonates with your exact tone, structure, and formatting" [14] rather than a one-size-fits-all summary. This template-driven approach means an advisor's client meeting can automatically produce a compliance-ready "Record of Advice," or a sales team's discovery call can output a formatted CRM entry – something generic tools don't natively do. Additionally, Reportr's integration with calendars to deploy recording bots is on par with Otter's approach, but we go further by automating **multi-format exports and email distribution** out-of-the-box (e.g., sending a polished PDF report to a client immediately after the meeting).

- **Sales Conversation Intelligence (e.g. Gong, Chorus.ai):** Gong and Chorus analyze sales calls to provide insights that help sales teams close deals. They've proven the value of conversation analytics – Gong reached a $7.5B valuation in 2021 and ~$100M revenue by focusing on sales conversations [15]. These platforms record calls, transcribe, then analyze for keywords, sentiment, talk ratio, and deal risk signals. They are often used by sales managers for coaching and forecasting. **Reportr's edge:** While these platforms are powerful, they are **specialized for sales use-cases** (Gong brands itself as "Revenue Intelligence" [16]). Reportr takes a more horizontal approach: we serve not only sales teams, but also consultants, financial planners, legal and accounting professionals – any use-case where meeting documentation is critical. Our AI summaries aim to be client-ready reports (not just internal insights), which sales tools don't provide. Moreover, Reportr's **price point** ($99/month for Pro) is far more accessible than enterprise contracts for Gong/Chorus that can run into thousands per seat. This opens advanced AI note-taking to individuals and small firms in various fields, not just Fortune-500 sales orgs. Finally, Reportr's customization (through templates and workflows) means a consulting firm could enforce a consistent meeting memo format, or a financial advisor can automatically populate a compliance checklist – capabilities outside the scope of sales conversation tools.

- **Industry-Specific AI Assistants (e.g. Marloo for financial advisers, Heidi Health for medical):** A new wave of startups is targeting specific verticals with tailored AI note-taking. **Marloo** is a direct competitor focused on financial advisers. Founded in 2024 by ex-Sharesies executives, Marloo just raised **A$4.2M (≈$4.6M)** in a pre-seed round led by Blackbird Ventures [17]. Marloo's pitch is that wealth, insurance, and mortgage advisors are "drowning in paperwork" and their AI can **save ~1 day per week** in compliance and admin work [18]. They have designed their product with intense on-the-ground research with hundreds of advisers, making it highly tuned to that workflow [19]. Marloo boasts features like advanced **custom templates** that capture notes in the adviser's own style [14] and an "Ask Marloo" AI assistant that lets users query client information or generate follow-ups (e.g. "summarize the last 3 meetings' action items" or "draft a follow-up email for this client") [20]. Another example is Heidi Health's AI scribe for doctors, showing how each industry has unique needs. **Reportr's edge:** We recognize the value of vertical focus, and indeed our **initial go-to-market is financial advisors** as well – we have domain expertise on the

team and template workflows ready for financial planning use cases. Where Reportr differentiates is in being a *platform for multiple professional verticals* from the start. Our architecture supports configurable templates not just for finance, but for any domain (sales, consulting, healthcare, legal) – giving us a larger addressable market over time. We aim to combine the *deep customization* of a tool like Marloo with the *flexibility* of a horizontal platform. In practice, that means a financial planner can benefit from compliance-focused features (just like Marloo offers), while a consulting firm can use the same platform to generate engagement summaries, and a sales team can produce call recap emails – all within Reportr. This "multi-niche" adaptability is a key competitive advantage. Additionally, being based in Sydney with plans for international expansion, we're competing in the same arenas as Marloo (Australia, New Zealand, UK) but will differentiate on product completeness and user experience. Marloo's early traction validates the market – they've reportedly onboarded both individual advisers and large firms in Australia/UK, with one testimonial citing **550+ meetings a month** being handled by Marloo at a wealth management firm [21] . Reportr can ride this momentum of awareness, but position our solution as *more extensible* beyond just financial advice, which is attractive to investors looking at scale.

Competitive Moats: To summarize, Reportr stands out by combining strengths of these categories without their limitations. We match the ease-of-use and integrations of general tools (calendar/Zoom/ Teams integration, real-time transcription) while delivering **structured, polished outputs** tailored to each use-case – something competitors either don't do or only do for one industry. We also emphasize data security (no sensitive client data will be used beyond the user's purpose, similar to Marloo's stance of not selling data [22]) and cross-platform availability, which will be crucial as companies worry about privacy with big tech solutions. Our **template management system** and "report generation workflows" with AI assistance are core technical differentiators that allow each customer's reports to feel hand-written. In short, while there are strong players in adjacent spaces, Reportr's versatility and focus on *professional-quality reports* (not just transcripts) give us a differentiated position.

Go-to-Market Strategy (GTM)

Initial Beachhead – Financial Advisors: We plan to launch in Australia first, targeting financial advisors and planners as our primary early adopters. This focus is intentional: our founding team has deep networks and insight in this industry (for instance, our advisor Tzvi Balbin runs a financial planning business). This gives us built-in credibility and access for pilot programs. Advisors in Australia and New Zealand are facing new compliance pressures and a shrinking adviser workforce post-royal commission [23] , meaning the remaining advisors *must* handle more clients with less time – a perfect storm of need for automation. By solving a pain point that literally gives them time back and compliance peace of mind, we expect high receptiveness. We will leverage industry connections (e.g. local Financial Planning Association chapters, industry conferences, and wealth-tech forums) to get in front of our target users. **Case studies and free trials** will be key in this phase: we'll offer the product free to a handful of small advisory firms and independent planners to generate success stories. For example, if one advisory firm can testify that Reportr saved them 8 hours a week and prevented compliance headaches (similar to Marloo's user who "reclaimed hours each week" and "the ROI is undeniable" [24]), we can convert that into marketing collateral.

Freemium and Viral Product-led Growth: Reportr will operate a **freemium SaaS model** to drive bottom-up adoption. The Free tier (e.g. 10 reports per week) lowers the barrier for any professional to try the service with their own meetings. This approach proved extremely effective for Otter.ai, which grew via viral loops built into the product. Each time an "AI meeting bot" joins a meeting, other attendees notice it – Otter saw that every bot joining created ~7.5 new user interactions from curious participants, driving their customer acquisition cost down to mere cents [25] . Reportr's calendar-

integrated bot will similarly serve as its own marketing agent. We will encourage free users to invite our bot to meetings with colleagues and clients; each such instance is an opportunity for exposure. Alongside this, we'll incorporate subtle branding on reports (for free tier) which encourages the report recipients to check out how it was generated. By optimizing these in-product virality loops, we aim to keep paid marketing spend low in early stages.

Beyond Organic – Targeted Marketing & Partnerships: In addition to product-led growth, we have a targeted marketing plan:

- *Content Marketing & Thought Leadership:* We will publish valuable content (blogs, webinars) on meeting productivity, compliance in advisory services, and AI in business. By educating the market, we can attract inbound interest. For example, discussing how AI note-takers can reduce compliance risks in financial advice (citing the well-known fact that advisers are overloaded with admin [1]) can draw those pain-aware prospects via SEO.

- *Strategic Partnerships:* We're exploring partnerships with platforms and associations that give us distribution. One avenue is **calendar and meeting platforms** – for instance, becoming an official partner/integrator in the Microsoft Teams and Zoom marketplaces so that users can add Reportr with one click. Similarly, partnering with CRM systems common in our target industries (e.g. Xero or IRIS for accountants, Salesforce Financial Services Cloud, or Xplan for financial planners) would allow us to feed meeting outputs directly into those systems. The WealthTech industry expects tight CRM integration from note-taking tools [26] , and by aligning with that trend we become more valuable and can piggyback on the CRM's install base. Another partnership route is with professional associations: imagine an endorsement or member discount from a Financial Planning Association or a continuing education webinar we run for their members – this lends credibility and reaches our exact audience.

- *Early Adopter Incentives:* We will implement referral programs (e.g. an existing user gets a month free for every new user they bring) and possibly "team plans" where small firms can onboard 3-5 users at a bundled rate. These tactics encourage word-of-mouth and team-wide adoption, critical in small business segments.

Enterprise GTM (Longer-Term): As we prove value in our beachhead, we will turn attention to larger organizations (enterprise consulting firms, big financial advisory networks, banks, etc.). Our strategy for enterprise sales involves offering **pilot programs** that address a specific pain point – for example, a consulting firm might start with "AI-generated meeting minutes" for one division. Success in a pilot can then be parlayed into an enterprise-wide rollout. We anticipate needing a direct sales approach here: identifying the innovation or operations heads in target firms and showcasing how Reportr ensures consistency and saves manager review time. A go-to-market advantage is that our product is already **enterprise-ready** on the technical side (OAuth2 integration with Google/Microsoft for security, data in a private cloud, etc.). We will further assure enterprise prospects with features like admin dashboards, team management, and data compliance (on our roadmap, similar to Marloo's offering of team management and compliance monitoring tools [27]). Early partnerships with VC firms and accelerators (we're open to international expansion, so possibly joining a program in the UK or US) could also open doors to enterprise clients.

Customer Support and Scaling: As our user base grows, supporting them is crucial for retention. In the beginning, our team will take a **hands-on approach** – white-glove onboarding for key clients (Pro and Enterprise tiers get priority onboarding [28]), and rapid response on any issues. Tzvi Balbin, with his background in client-facing roles, will spearhead early support and account management, ensuring we turn our first users into champions. To scale this, we'll invest in a comprehensive self-serve knowledge

base and in-app guidance (tooltips, setup wizards). We are also considering an AI-driven support chatbot for common questions – given our AI expertise, we can deploy a fine-tuned model to handle tier-1 support queries, escalating to humans when needed. This hybrid support model will allow us to maintain quality service without linearly scaling support headcount. Lastly, user feedback loops (monthly webinars, feedback forms after report generation) will be instituted so that as we grow, we continue to iterate on the product in line with user needs, keeping engagement high.

Business Model and Pricing

Reportr's business model is a **Freemium SaaS subscription** with a clear upgrade path, mirroring successful plays in this space [29] . Here's how it breaks down:

- **Free Tier:** The free plan (e.g. *"Basic" – 10 reports per week, limited features) is designed to eliminate friction for new users. It requires no credit card and allows users to experience the core value: the bot joins their meetings and produces a report. By offering meaningful (but capped) usage for free, we aim to drive viral adoption and hook users with the convenience. Competitors follow this approach – Marloo offers a free tier covering 10 meetings (with up to 5 custom templates) to get advisors started [30] [31] , and Otter's free plan similarly offers limited transcription minutes to draw users in [29] . We expect many solo professionals and small teams to start here and then bump against the limits.

- **Pro Tier (Paid)**: Our **Pro plan is $99 per user per month** (with a discount for annual commitment). This pricing has been effectively **validated in the market** – Marloo prices its Pro offering at the same $99/user/month level [32] , and customers are paying it, given the ROI of time saved. For context, $99/month is a fraction of the value a professional gets back: if Reportr saves an advisor even 4 hours a week, that's ~16 hours a month. At a typical billable rate or value of $100/hour, that's $1,600 of time freed – paying $99 to reclaim ~$1.6k is a no-brainer. In fact, early users of competitor products speak to this ROI: one financial advisor said the tool "probably freed up 5-10 hours each week… so we can spend more time with clients and growing our business" [3] . Another noted they *"increased client capacity without adding overhead"* [24] thanks to automating notes. We believe Reportr will drive similar outcomes. The Pro tier includes **unlimited meetings and transcripts**, full AI report generation capabilities, unlimited custom templates, and priority support [33] [28] . Essentially, a professional on Pro can offload all their meeting documentation to Reportr.

- **Enterprise Tier:** For larger organizations, we offer a custom-priced tier. This includes everything in Pro, plus enterprise-specific needs: dedicated account management, **custom integrations** (for example, integrating Reportr directly into a firm's CRM or document management system), advanced analytics and reporting on usage, and service-level agreements (SLAs) for uptime/support [34] [35] . Enterprise clients might prefer an annual contract per seat or even a usage-based pricing if they want to deploy org-wide. We are flexible here – the key is to remove any barriers for a big client to say "yes." Given that our cost of delivery is tied mostly to computing (transcription & AI processing) and storage, we can structure enterprise pricing to be either per user or based on a block of meetings, depending on what aligns with their procurement preferences. **Usage-based billing** is indeed an option we're considering for enterprise: for instance, a base subscription plus a fee per additional meeting above a threshold, which could make sense for firms that have highly variable meeting volumes. This hybrid model is used by some SaaS vendors and can align price with value received, but we'll validate it with pilot enterprise customers.

- **Additional Revenue Opportunities:** Down the line, we see potential in a **template marketplace or professional services**. Because Reportr supports configurable templates (for different meeting types or industries), there's an opportunity for power users or consulting partners to create specialized template packs (for say, "Financial Planning Annual Review" or "Sales QBR Meeting") which could be shared or sold to others. While our focus is on subscription revenue, a modest marketplace could drive engagement and a small revenue cut for Reportr. Additionally, we may offer paid **onboarding or training services** for enterprise clients who want custom onboarding for hundreds of employees, or even consulting on how to best integrate AI notes into their workflow. These would be ancillary revenues to supplement the core SaaS income.

Validation of Pricing: The $99/month Pro price point was hypothesized based on value delivered, and we've gotten encouraging early signals. Conversations with a few beta users (financial planners) indicated willingness to pay in the range of A$100-$150 per month for unlimited use if the product reliably saves them several hours weekly. The fact that a direct competitor is successfully signing on advisors at $99/month [32] further de-risks this price. We also examined pricing of adjacent tools: Otter.ai's business plan is about $20/month, but it's a mass-market product with far fewer specialized features; conversely, a Gong or Chorus in the sales domain can cost **>$1,200 per user/year** (roughly $100+/month) and requires annual contracts. Reportr delivers specialized value closer to the Gong side (in terms of impact) but at a price affordable to an independent professional, akin to a premium Otter. This positioning feels right for our target market. We will, of course, remain open to pricing feedback and adjust if needed (for example, if we find that lawyers would pay $200/month for a legal-specific version, we might introduce a higher tier or add-on for that segment).

Freemium Conversion Metrics: We intend to track free-to-paid conversion closely. In similar SaaS models, a **5-10% conversion** from free to paid is considered healthy, but we'll optimize our funnel by using usage limits as triggers. As noted in Sacra's analysis of Otter, their tiered limits led 73% of Pro (mid-tier) users to hit limits within 4 months, nudging many to upgrade further [36]. For Reportr, the free tier's cap (10 reports/week) is chosen so that a busy professional will bump into it and see value in upgrading. Our template features will also entice upgrades: free users can try basic templates, but premium users get the full power of customization – once a user has invested time in tailoring a report template to their needs, they're more likely to pay to use it without restriction. Our target is to convert at least 10% of active free users to Pro within the first 3 months of adoption, and to continually increase that as the product matures and demonstrates clear ROI.

Product Engagement and Expansion Strategy

Key Features Driving Engagement: Reportr's design includes features specifically to drive high user engagement and retention: - **Seamless Integration into Workflow:** By integrating directly with users' calendars (Google and Microsoft), Reportr removes friction. Users don't have to remember to hit "record" or start a transcription – the bot auto-joins scheduled meetings. This kind of integration is now expected; Otter's success was in part due to their calendar-integrated *OtterPilot* that automatically joins meetings [37]. We meet this bar, ensuring using Reportr becomes a habit that requires *little effort* from the user. - **Real-Time and Accuracy:** Our technical stack (Spring Boot WebFlux backend, OpenAI-powered transcription with speaker diarization) ensures that as soon as a meeting is over, a high-accuracy transcript and initial summary are ready. Fast turnaround keeps users engaged (they get value immediately while the meeting context is fresh). We also leverage advanced speech recognition – akin to how Otter built a proprietary ASR engine for better accuracy [38] – to ensure the raw material (transcript) is reliable. This reduces the need for users to make corrections, building trust in the system. - **Customized, Actionable Outputs:** Beyond just text transcripts, Reportr generates **structured reports** with key sections (decisions made, action items, next steps, etc.) according to the meeting template.

This means every report has *immediate utility*. For example, a sales meeting report isn't just notes; it can include automatically extracted action items and even a draft follow-up email. The WealthTech guide notes that baseline expectations now include action item extraction and workflow triggers [26] – we've incorporated these from the start. When users see that each meeting yields not only a record but also ready-to-use outcomes (tasks to check off, an email to send, a client summary to file), they'll keep coming back. It makes them more productive with *no extra work on their part*. - **"Ask Reportr" AI Assistant (Roadmap):** Taking inspiration from competitors like Marloo's *Ask Marloo* feature, we plan to roll out an **interactive AI assistant** that lets users query their corpus of meeting data. Users will be able to ask questions like, "What did I promise the client John in our last meeting?" or "Summarize all the follow-ups from my meetings this week." This transforms Reportr into a knowledge hub, not just a note archive. Given Marloo is already offering this Q&A capability to advisers [20], it's clearly a valued feature. By implementing our own, we boost engagement – users will log in to query past meetings whenever they need information, increasing the stickiness of the platform. The end goal is to make Reportr an indispensable "second brain" for all client interactions. - **User-Centric Design and Feedback Loop:** We are building a modern, intuitive frontend (Next.js + Tailwind CSS) that has a **dashboard** for scheduled meetings and past reports, making it easy to navigate. The ease-of-use (Marloo's users praise its design and simplicity [39]) will encourage adoption by even non-tech-savvy professionals. Additionally, we actively solicit user feedback on reports – e.g., a one-click "Was this report useful?" or "Improve this section" – feeding those back to our AI model refinement. By involving users in refining the output to their liking, we increase their satisfaction and retention. They feel the product is tailored to them (which it literally is, through the template customization).

Product Roadmap – Beyond Transcription: While our current core is meeting recording->transcription->report generation, we have a **vision that extends further into the workflow**: - **CRM and Workflow Integration:** A logical next step is to integrate outputs into the systems where users manage their work. For sales teams, that's CRM (Salesforce, HubSpot); for advisors, it might be a client management system or even a simple Excel/Sheets. We plan to build connectors such that after a meeting, not only is a report generated, but key data points can automatically populate the CRM (e.g. meeting date, summary, next steps logged as tasks). This aligns with industry trends – AI notetakers are "syncing tightly with CRMs, dynamically updating client profiles… and automating task creation" [40] . By doing this, Reportr moves from a standalone tool to an embedded part of the user's existing toolkit, making it harder to rip out (great for retention) and increasing the value delivered. - **Pre-Meeting Prep and Scheduling:** We can leverage AI to also help *before* meetings. For instance, analyzing past meeting notes to suggest an agenda or talking points for an upcoming client call, or even automating the scheduling of the next meeting (since Reportr knows when the last one was and what follow-ups were due). This kind of proactive assistant functionality will further differentiate us. Imagine Reportr sending a notification: "You have a review meeting with Client X tomorrow; here's a brief of their goals and what was discussed last time." This turns Reportr into more of a full-cycle meeting assistant, not just post-meeting documentation. - **Compliance Automation:** For regulated sectors, we plan to build in compliance checks – for example, flagging if certain language is missing. In financial advice, if an advisor forgets to mention a required disclosure, an AI could catch that. The WealthTech report indicates future versions will do real-time compliance surveillance for missing disclosures and risk flags [41] . We envision Reportr evolving in that direction: perhaps highlighting in a draft report any section that looks like it might need a compliance review (like risk warnings, or documenting that a particular form was provided). Long-term, this could extend to **templates that align with regulations** (e.g. a "Statement of Advice" generator that knows the regulatory format in Australia). - **Multi-Language and Localization:** As we expand geographically (NZ, UK, and beyond), we'll adapt the product to local languages and accents (our transcription AI will be trained for different dialects and industry jargon – e.g. Australian English financial terminology). We'll also localize templates to match regional business norms and compliance requirements (for example, UK financial advisors have a "suitability letter" which could be a template). - **Adjacent Vertical Expansion:** Once we establish a solid base in the financial/

professional services realm, Reportr can be extended to other industries that have heavy meeting documentation needs. One example is healthcare – doctors and therapists could use a version of Reportr (with proper privacy protections like HIPAA compliance) to generate consultation notes or medical reports. In fact, the idea of an "AI scribe" is already being trialed in healthcare (e.g. New Zealand's Health NZ is testing an AI scribe called Heidi Health [42]). Another example is legal – attorneys could use Reportr during client meetings or depositions to produce summary memos or even first drafts of legal meeting minutes. Our architecture built on reactive, scalable tech means we can handle these expansions relatively easily from a tech standpoint; it's mostly about developing the right templates and ensuring compliance in each industry. This expansion strategy significantly **increases our TAM** over time, and investors will appreciate that Reportr isn't limited to one niche.

Data Security & Compliance: As we handle sensitive meeting content, Reportr is built with security first. We use cloud storage (AWS S3) for recordings with encryption, and all data access is governed by OAuth2 and strict permissions (only the meeting organizer and invited participants can view a report, etc.). We will be pursuing industry-standard compliance certifications (such as SOC 2) as we grow into enterprise accounts. For healthcare or EU clients, we will ensure HIPAA and GDPR compliance respectively – including data residency options if required. We also provide **consent management** features: for example, the meeting invite can include a note "This meeting will be recorded by Reportr for note-taking purposes" to ensure transparency to all participants. These measures not only mitigate risks but can become a selling point (especially versus generic tools – e.g., some firms might prefer a focused tool like Reportr over using Zoom's built-in AI notes, because they want more control over the data and specialization). Our philosophy is aligned with what Marloo emphasizes: the advisor (user) retains control and we **do not use client data for any purpose except to serve that user** [22] . All AI processing via OpenAI or similar will be done with opt-in and with data handling agreements in place to prevent data leaks. By staying ahead on compliance, we address any enterprise hesitations early and ensure we can serve even highly regulated clients.

Growth Projections and Fundraising Insights

Customer Acquisition Cost (CAC) & Lifetime Value (LTV): We anticipate a very efficient customer acquisition, especially in the early stages. Thanks to the product-led viral loops and our targeted outreach in tight-knit communities (like financial planners in Australia), our CAC for initial users is low. Otter.ai's viral meeting presence brought their CAC down to an astounding ~$0.32 per user [25] . While that's a broad product, it illustrates how a well-engineered viral loop can slash acquisition costs. Reportr's strategy of embedding itself in meetings (and thereby marketing to every participant) follows this playbook. We might spend modestly on content or partnerships, but we expect word-of-mouth and the "wow factor" of the product to do the heavy lifting. On the other side, the **LTV** of a customer in our target market is high. This is a B2B workflow tool with subscription revenue – once it's part of a professional's routine, churn should be low. Consider that sales teams account for 68% of revenue in the AI notetaker space and have higher 12-month retention rates due to the value delivered [43] . Financial advisors and similar professionals should exhibit similar retention if we keep addressing their needs. At $99/user/month, a customer is worth ~$1,188/year (assuming some take annual plans at a slight discount). If an average customer stays 3+ years (which is reasonable for B2B software with high stickiness, once integrated into workflow), the LTV is around $3,500. Even factoring in support and infrastructure costs, the gross margins are high (Otter enjoys ~70-80% gross margins on their SaaS [44] , and our cloud-native architecture should be similar). With a low CAC approach, our LTV:CAC ratio could be very attractive (targeting >5:1). We will monitor these metrics closely and ensure that any scaling of paid marketing still yields efficient payback. In early phases, though, our CAC might not even be monetary – it's our time and effort on outreach and excellent service (which we consider an investment in product-market fit).

Fundraising Needs and Runway: As of now, Reportr is pre-revenue with a working product and a committed team. We intend to raise capital to accelerate go-to-market and continue product R&D (particularly the advanced AI features and integrations on the roadmap). Looking at comparables, our competitor Marloo raised ~$4.2M at pre-seed [17], which we interpret as roughly 18–24 months of runway for a team scaling to perhaps 10-15 employees. We anticipate a similar need. To comfortably iterate on the product, support a growing user base, and hit meaningful revenue milestones, **we plan for ~18-24 months of runway post-fundraise**. In practical terms, that means if we raise, say, a $2M–$3M seed round (hypothetically), we would allocate it towards hiring in engineering (to continue building unique features faster than competitors), sales/marketing (to execute the GTM described), and covering cloud infrastructure as usage grows. Our burn rate will increase as we hire, but we will be judicious – leveraging open-source and cost-effective AI infrastructure where possible to keep costs in check. The goal is to reach a point of either breakeven or strong metrics for a Series A before that runway ends.

Profitability in absolute terms may not be the immediate goal (as is typical in VC-backed SaaS; growth is prioritized), but we do want a clear path to profitability. With gross margins around 75% and a lean engineering-centric team, we believe we could become profitable at a relatively modest scale – potentially once we hit on the order of $5M in ARR, the business could cover its costs comfortably. That could be achievable in 3-4 years with the right growth curve. For the next 24 months, however, our focus is on **growth milestones** rather than profitability, with the assumption that we'll raise a Series A to further fuel global expansion once we prove traction in ANZ and the UK.

Revenue and User Milestones (12-24 Months): We have aggressive but achievable targets to make Reportr an attractive venture investment: - **Year 1 (next 12 months):** Aim to acquire on the order of *hundreds* of paying users and a solid base of active free users. In financial terms, we're targeting ~$100k in Annual Recurring Revenue within 12 months post-launch. This could come from, for example, 100 Pro subscribers (which is $120k ARR at $99/mo each – a mix of individuals and small teams). Achieving this would validate our pricing and sales motion. Underpinning that, we want to see high engagement metrics (e.g. at least 70% of trial users creating multiple reports per week, retention of >90% month-over-month in the first few months of use). We'd also like to land 1-2 **pilot enterprise clients** in year 1 – perhaps a mid-sized advisory firm or a consulting boutique – to showcase that our solution scales for teams and not just individuals. - **Year 2 (months 13-24):** This is about scaling and preparing for a potential Series A. We aim to grow ARR to the **$1M+ range by month 24**. That could mean roughly ~800-1,000 paying users (if mostly Pro seats) or fewer users if we secure some enterprise deals. Given the total addressable professionals in our initial markets (tens of thousands in our niches), capturing on the order of a thousand users is an attainable slice with good marketing and word-of-mouth. We also expect by year 2 to have a foothold in the **UK market** (which might contribute a portion of those users) and possibly early adopters in one additional market (perhaps the US or Canada, if we see organic sign-ups there). Another milestone for year 2 is expanding product capabilities as planned – by that time we want Reportr to not just be a "note-taker" but a **full meeting workflow assistant**. Achieving key product milestones (like the launch of the "Ask Reportr" AI Q&A feature, CRM integration, and compliance dashboard) will be proof points that we're innovating ahead of the curve, which investors will look for. On the team side, by 24 months we will have built out a customer success function and a small sales team to handle larger clients, ensuring we can sustain growth beyond the early adopter phase.

Use of Funds & Investor Narrative: When approaching VCs, we will articulate that the funds will predominantly go into **scaling the team and product** to accelerate growth in a winner-takes-most market. The recent funding of Marloo shows VCs are backing this space; Blackbird's partner likened Marloo's strategy to "the early days of Canva" with a global-first approach [45] . We want to convey a similarly bold vision: Reportr isn't just a nice-to-have transcription service, it's aiming to be the *de-facto*

meeting workflow platform for professional services, just as Canva became de-facto for design. To do this, we'll highlight how our team's blend of technical and domain expertise (Oren's engineering and sales background, Adam's product implementation skills, Tzvi's industry and marketing acumen) uniquely positions us to execute. We'll also emphasize any early accolades or traction (even anecdotal, like positive quotes from beta users or interest from an association) to show momentum.

In terms of **exit potential**, investors will be keen to know that large players might want to acquire this tech if we execute well (e.g., Microsoft or Zoom could integrate it directly, or a big CRM like Salesforce might want a native meeting notes solution). The space is active – Chorus.ai's acquisition for $575M in 2021 [46] , and Gong's $7B valuation, show that strategic value is being recognized. Our job is to convince investors that backing Reportr now could lead to capturing a significant market or a lucrative exit. We have the ingredients: a clear pain point, a strong solution, a huge market opportunity validated by competitor funding, and a capable, execution-focused team.

Conclusion: Reportr is building an AI-powered platform to automate a ubiquitous workflow burden. By starting in financial services (where the pain is acute and quantifiable) and then expanding outward, we position ourselves for scalable growth. We've done the research, we see the trends – professionals want more than just transcripts; they want **actionable intelligence and time saved**. Competitors like Marloo have proven that delivering this value can quickly attract users and investors. With Reportr's broader vision and robust tech stack, we are confident we can not only match but exceed what competitors offer, capturing a broad swath of the market. The next steps are executing our go-to-market, delighting our early users, and leveraging a seed investment to sprint toward key milestones. In doing so, we aim to build a company that can secure a strong Series A and eventually become the **leading AI meeting report platform** internationally, all while solving a very human problem – giving people their time (and sanity) back from meeting madness.

Sources:

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