

Optiply Product Growth Roadmap 2026

The Opportunity

Optiply has established itself as a leading **inventory optimization SaaS** platform, helping customers make intelligent purchase order decisions with seamless ERP integration. However, critical gaps in our end-to-end workflow prevent us from delivering the complete automation our customers need—and our competitors are rapidly closing in with AI-powered solutions.

The Problem

Despite our strong inventory optimization core, customers still face significant manual work:

- **Double data entry:** Orders placed in Optiply sync to ERP ✓, but customers must manually re-enter data in supplier portals X
- **Manual supplier communication:** Reading and processing supplier emails takes 10-15 minutes each
- **Expensive EDI processing:** Third-party processors cost thousands monthly with slow turnaround
- **Time-consuming invoice matching:** 30-60 minutes per invoice for 3-way verification
- **Disconnected logistics:** No integration between inventory optimization and container/freight management

These gaps cost our customers **6-8 hours per day** in manual work and prevent us from winning larger enterprise deals.

The Solution: 5 Strategic Growth Initiatives

We will deliver **end-to-end supply chain automation** through five integrated initiatives:

1. AI-Powered PO Data Input (Deck Partnership) - Q1-Q2

- Eliminates double data entry in supplier portals
- 90% time reduction (20-30 min → 2-3 min per PO)

2. Supplier Email Analysis - Q2

- Automated extraction of availability, pricing, lead time changes
- 90% time reduction (10-15 min → 1-2 min per email)

3. In-House EDI Integration - Q2-Q3

- Replace expensive third-party processor
- 100% cost savings + real-time processing

4. 3-Way Matching Automation - Q3-Q4

- Automated PO/GRN/Invoice verification
- 95% time reduction (30-60 min → 1-2 min per invoice)

5. Container Optimization Pilot - Q3-Q4

- Smart container filling with freight forwarder partnerships
- 15-30% logistics cost reduction + new revenue stream

Business Impact

Competitive Differentiation:

- **End-to-end automation** (supplier communication → invoice matching → logistics)
- **AI-first platform** (leveraging latest AI for every workflow)
- **Ecosystem integration** (EDI, email, portals, ERPs, freight forwarders)
- **Operational efficiency** (70%+ reduction in manual work)

Financial Impact (EOY 2026 Target: €250-300K):

- **Deck PO Automation:** €75-100K (enterprise upsells, 5-10 customers @ €10-20K increase)
- **Email Analysis:** €60-90K (churn reduction, save 3-5 customers @ €20-30K ARR)
- **EDI Integration:** €50-75K (premium feature upsells, 10-15 customers @ €5-10K)
- **3-Way Matching:** €45-75K (enterprise expansion, 3-5 new customers @ €15-25K)
- **Container Optimization:** €120-288K (NEW marketplace revenue, 20-30 containers/month @ €500-800 gross profit)

Container Economics:

- Customer pays: €2,000 (vs. €3,000 direct) = €1,000 savings (33%)
- Optiply pays: €1,500 to freight forwarder
- Gross profit: €500-800 per container
- Target: 10-15 customers booking 20-30 containers/month

Customer Value:

- Reduce daily manual work from **6-8 hours → 1-2 hours** (75-85% efficiency gain)
- Near-zero error rates through AI-powered automation
- Real-time visibility into entire order-to-payment cycle
- Scalability to support 3x order volume without additional headcount

Aggressive Timeline & Current Progress

February 2026 (NOW - All Initiatives Start):

- Deck contract signed, pilot testing started
- All 5 initiatives begin exploration and prototyping
- Customer discovery calls to validate pain points

12-Month Execution (2026):

- Q1: Rapid pilots with 3-5 customers per initiative
- Q2-Q3: Scale to production, revenue generation begins
- Q4: Full rollout, achieve €250-300K revenue target

Resource Model:

- Mix of internal development + strategic external partnerships (Deck, freight forwarders)

- Leverage existing Optiply Strategic Agent Platform (LangGraph foundation)
- Phased rollout minimizes risk and validates ROI incrementally

Success Metrics

- **Revenue:** +€250-300K ARR (10% growth from current €2.5-3M)
 - **Container Optimization:** €120-288K annual gross profit (20-30 containers/month @ €500-800 margin)
 - **Retention:** Save 3-5 customers from churn (€60-90K retained ARR)
 - **Enterprise Expansion:** 5-10 upsells (€75-100K additional ARR)
 - **Efficiency:** 70%+ reduction in customer manual work
 - **Market Position:** Recognized as AI-first supply chain platform leader
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2. Strategic Context: Vision & Market Positioning

Our Vision

"Transform Optiply from an inventory optimization tool into the AI-powered operating system for end-to-end supply chain management."

Today, Optiply helps customers optimize *what* to order. Tomorrow, we'll automate the *entire workflow*—from supplier communication through payment, including logistics optimization.

Market Opportunity

The supply chain SaaS market is undergoing rapid AI transformation:

- **Competitors** are adding AI features (chatbots, basic automation)
- **Enterprise customers** demand complete automation, not point solutions
- **SMB/Mid-market** customers seek efficiency gains to compete with larger players
- **First-mover advantage** in AI-powered end-to-end automation creates defensible moat

Competitive Differentiation

Capability	Optiply Today	Competitors	Optiply 2026 (This Roadmap)
Inventory Optimization	✓ Best-in-class	△ Basic	✓ Enhanced with AI agents
ERP Integration	✓ Seamless sync	✓ Standard	✓ Maintained
Supplier Portal Automation	✗ Manual	✗ Manual	✓ AI-powered (Deck)
Email Analysis	✗ Manual	✗ Manual	✓ AI extraction & auto-apply
EDI Processing	△ Third-party	△ Third-party	✓ In-house, real-time
Invoice Matching	✗ Manual	△ Basic OCR	✓ AI 3-way matching
Logistics Optimization	✗ Not integrated	✗ Separate tools	✓ Container optimization
End-to-End Automation	✗ Gaps	✗ Fragmented	✓ Complete workflow

Our Unique Position: Only inventory SaaS delivering AI-powered automation across the *entire* supply chain workflow—from supplier communication to logistics.

Why Now?

1. **AI Technology Maturity:** LLMs, OCR, and agentic AI are production-ready
 2. **Customer Demand:** Enterprise customers explicitly requesting complete automation
 3. **Competitive Pressure:** Window to establish leadership before competitors catch up
 4. **Platform Foundation:** Optipty Strategic Agent Platform (LangGraph) already built
 5. **Partnership Readiness:** Deck, freight forwarders, EDI standards bodies aligned
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3. Roadmap Timeline: 2026 Execution Plan

Quarter-by-Quarter Breakdown

February 2026 (NOW - All Initiatives Start):

- **Deck PO Input:** Contract signed, kick-off meeting completed, pilot testing started
- **Customer Opt-in Campaign:** Working with Joren (CS team) to recruit pilot customers
- **Email Analysis:** Prototype development begins
- **EDI Integration:** Partnership discussions, architecture planning
- **3-Way Matching:** Proof-of-concept with PDF parsing
- **Container Optimization:** Freight forwarder outreach
- **Customer Discovery:** Calls with customers to validate pain points and value

Q1 2026 (Mar-Apr): Rapid Pilots & Customer Validation

- Data-Quality/Onboarding Agent MVP operational (existing roadmap)
- Deck PO Input: 3-5 pilot customers live, validate time savings
- Email Analysis: Beta with 5-10 customers
- EDI Integration: Pilot with 1-2 customers (replace third-party)
- 3-Way Matching: Alpha testing
- Container Optimization: Partnership signed, pilot design

Deliverables:

- All 5 initiatives have active pilots
- Early revenue tracking begins
- Customer feedback loops established

Q2 2026 (May-Jun): Scale & Revenue Generation

- Order Agent operational (existing roadmap)
- Strategic Agent operational (existing roadmap)
- Deck PO Input: Expand to 10-15 customers, measure revenue impact
- Email Analysis: Production launch, 15-20 customers
- EDI Integration: Production pilot, 3-5 customers
- 3-Way Matching: Beta testing, 5-10 customers
- Container Optimization: First containers booked, revenue tracking

Deliverables:

- Revenue tracking shows progress toward €250-300K target
- Customer success stories and case studies
- Continuous optimization based on feedback

Q3 2026 (Jul-Sep): Scale to Broader Customer Base

- 🚀 Deck PO Input: 20-30 customers, full rollout preparation
- 🚀 Email Analysis: 30-40 customers, auto-apply rate >70%
- 🚀 EDI Integration: 10-15 customers (replace third-party for all)
- 🚀 3-Way Matching: Phase 1 production (auto-flag), 15-20 customers
- 🚀 Container Optimization: 10-15 customers, 15-20 containers/month

Deliverables:

- Revenue tracking shows €150-200K achieved (60-70% of target)
- Customer retention improvements measurable
- Enterprise upsells closing

Q4 2026 (Oct-Dec): Full Rollout & Target Achievement

- 🚀 All initiatives available to full customer base
- 🚀 3-Way Matching: Phase 2 (tolerance-based auto-approval)
- 🚀 Container Optimization: 20-30 containers/month, €120-288K annual run rate
- 🚀 Platform-wide optimization and performance tuning

Deliverables:

- **€250-300K revenue target achieved** (10% of €2.5-3M ARR)
- Revenue attribution by initiative validated
- 2027 expansion plans defined
- Customer success stories and market positioning established

Critical Path & Dependencies**Critical Dependencies:**

1. **Data Quality → Order/Strategic Agents:** Clean data required for autonomous ordering
2. **Deck Partnership → PO Automation:** Partnership must be finalized before integration
3. **Email Analysis → Data Quality:** Email extractions feed data-quality agent
4. **EDI Integration → 3-Way Matching:** EDI invoices enable automated matching
5. **Inventory Optimization → Container Optimization:** PO advice drives container filling logic

Risk Mitigation:

- Parallel development tracks minimize blocking
- Phased rollouts allow early validation and course correction
- External partnerships (Deck, freight forwarders) have backup options
- Existing LangGraph platform reduces technical risk

4. Customer Value Transformation

Before & After: Supply Chain Analyst's Daily Workflow

Current State (Manual Process):

6–8 hours/day of manual work:

- └ Morning: Read supplier emails, manually update system (1–2 hours)
- └ Mid-Morning: Review Optiply P0 advice, place orders (30 min)
- └ Late Morning: Log into supplier portals, re-enter P0 data (2–3 hours)
- └ Afternoon: Track orders via emails and phone calls (1–2 hours)
- └ Late Afternoon: Process invoices, 3-way matching (1–2 hours)

Future State (AI-Powered Automation):

1–2 hours/day of strategic oversight:

- └ Morning: Review dashboard, see overnight email analysis auto-applied (10 min)
- └ Mid-Morning: Review AI-proposed P0s, approve with one click (15 min)
- └ Late Morning: Deck AI submits P0s to portals (analyst reviews before submission) (15 min)
- └ Afternoon: EDI confirmations auto-update system (0 min – fully automated)
- └ Late Afternoon: Review 3-way matching exceptions only (20–30 min)

Transformation: 75-85% reduction in manual work

Customer Value by Initiative

Initiative	Current Pain	Future Benefit	Time Savings	Business Impact
Deck PO Input	20-30 min/PO manual portal entry	2-3 min review & confirm	90%	Eliminates double data entry, zero errors
Email Analysis	10-15 min/email manual processing	1-2 min review flagged items	90%	No missed information, immediate updates
EDI Integration	\$X,XXX/month third-party fees	\$0 + real-time processing	100% cost	Eliminate fees, full transparency
3-Way Matching	30-60 min/invoice manual comparison	1-2 min exception handling	95%	Near-zero payment delays
Container Optimization	High shipping costs, manual booking	15-30% cost reduction	N/A	New revenue stream, integrated logistics

Customer Segments & Use Cases

SMB Customers (Small-Medium Business):

- **Pain:** Limited staff, can't afford manual processes
- **Value:** Automation enables them to compete with larger players
- **Impact:** Process 3x more orders with same headcount

Mid-Market Customers (Scaling Operations):

- **Pain:** Growing pains, manual processes don't scale
- **Value:** Efficiency gains support growth without proportional hiring
- **Impact:** Scale from 100 → 300 orders/day without adding staff

Enterprise Customers (Complex Supply Chains):

- **Pain:** High volume, multiple suppliers, complex logistics
 - **Value:** End-to-end automation + container optimization
 - **Impact:** 70%+ efficiency gains + 15-30% logistics cost reduction
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5. Platform Architecture: How 10 Capabilities Integrate

Unified Platform Vision

The **Optiply Strategic Agent Platform** (LangGraph-based) serves as the foundation, orchestrating 10 integrated capabilities:

6 Existing Agents (from Agentic Layer Roadmap):

1. Data-Quality/Onboarding Agent
2. Order Agent
3. Strategic/Supply-Chain Agent
4. Data Co-pilot
5. Explanatory Agent (Intercom Fin)
6. Web-Scraping/Browser Agent (Deck)

4 New Growth Initiatives:

7. AI-Powered PO Data Input (extends Web-Scraping Agent)
8. Supplier Email Analysis (feeds Data-Quality Agent)
9. In-House EDI Integration (platform infrastructure)
10. 3-Way Matching Automation (standalone capability)

+ Container Optimization Pilot:

11. Container Optimization (integrates with Order Agent)

Data Flow: End-to-End Automation

1. Supplier Communication → Data Quality

- Supplier sends email (availability, pricing, lead time)
- Email Analysis Agent extracts information
- Data-Quality Agent validates and updates system

- Inventory Optimization Engine adjusts PO advice

2. PO Generation → Order Placement

- Inventory Optimization generates PO advice
- Analyst reviews and approves in Optiply
- Order syncs to customer ERP ✓
- Deck AI automatically enters PO in supplier portal ✓

3. Order Tracking → Real-Time Updates

- Supplier sends EDI confirmation (855 PO Acknowledgment)
- In-House EDI Engine processes immediately
- System auto-updates order status
- Analyst sees real-time dashboard

4. Shipping → Logistics Optimization

- Container Optimization Agent identifies orders for same supplier/region
- Suggests combining into shared container
- Analyst approves, system books through freight forwarder partnership
- 15-30% cost savings realized

5. Invoice → Payment Automation

- Supplier sends invoice (PDF or EDI 810)
- 3-Way Matching Agent compares PO, GRN, invoice
- Auto-approves matches within tolerance
- Flags exceptions for analyst review only

Platform Benefits

For Customers:

- Single platform for entire supply chain workflow
- Consistent user experience across all capabilities
- Real-time visibility and analytics
- Seamless integration with existing ERP systems

For Optiply:

- Shared infrastructure reduces development costs
- Cross-capability insights improve AI accuracy
- Platform network effects (more data → better optimization)
- Defensible competitive moat

6. Business Metrics & ROI

Revenue Growth Projections

Current State (2025):

- ARR: €2.5-3M
- Target EOY 2026 Impact: **+€250-300K (10% growth)**
- Sander's Goal: 10% revenue contribution from these initiatives

Revenue Model by Initiative:

Initiative	Revenue Driver	Customers	Unit Economics	Annual Contribution	% of Target
Deck PO Automation	Enterprise upsells	5-10	€10-20K increase/customer	€75-100K	30-35%
Email Analysis	Churn reduction	3-5 saved	€20-30K ARR/customer	€60-90K	25-30%
EDI Integration	Premium upsells	10-15	€5-10K/customer	€50-75K	20-25%
3-Way Matching	Enterprise expansion	3-5 new	€15-25K/customer	€45-75K	15-20%
Container Optimization	Marketplace revenue	10-15	€500-800 margin/container	€120-288K	40-50%
TOTAL				€350-628K	140-210%

Conservative Target: €250-300K (assumes 70-80% achievement rate)

Detailed Revenue Drivers:

1. Deck PO Automation (€75-100K)

- **Mechanism:** Eliminates double data entry → enables enterprise upsells
- **Target:** 5-10 enterprise customers @ €10-20K increase
- **Rationale:** Enterprise customers pay premium for complete automation
- **Timeline:** Q2-Q3 upsells close, Q4 revenue recognized

2. Email Analysis (€60-90K)

- **Mechanism:** Auto-apply supplier updates → reduces churn
- **Target:** Save 3-5 customers from churning @ €20-30K ARR each
- **Rationale:** Customers churn due to manual work; automation increases stickiness
- **Timeline:** Q2-Q3 retention improvements measurable

3. EDI Integration (€50-75K)

- **Mechanism:** In-house EDI → premium feature upsell
- **Target:** 10-15 customers @ €5-10K premium
- **Rationale:** Customers currently pay third-party €6-18K/year; we offer better value
- **Timeline:** Q3-Q4 upsells as third-party contracts expire

4. 3-Way Matching (€45-75K)

- **Mechanism:** Automated invoice matching → enterprise expansion
- **Target:** 3-5 new enterprise customers @ €15-25K ARR
- **Rationale:** Enterprise customers need invoice automation for scale
- **Timeline:** Q3-Q4 new customer acquisition

5. Container Optimization (€120-288K) - HIGHEST POTENTIAL

- **Mechanism:** Marketplace model with freight forwarder partnerships
- **Economics:**
 - Customer pays: €2,000 (vs. €3,000 direct) = **€1,000 savings (33%)**
 - Optiply pays: €1,500 to freight forwarder
 - Gross profit: **€500-800 per container**
- **Target:** 10-15 customers booking 20-30 containers/month
- **Assumptions:**
 - Average customer books 2-3 containers/month
 - 10-15 active customers = 20-45 containers/month
 - Conservative: 20-30 containers/month @ €500-800 = €10-24K/month = **€120-288K/year**
- **Timeline:** Q2 first containers, Q3-Q4 scale to 20-30/month

Cost Savings

Direct Cost Savings:

Initiative	Current Cost	Future Cost	Annual Savings
EDI Processing	\$X,XXX/month third-party	\$0 (in-house)	\$XXX,XXX/year
Customer Support	High (manual process issues)	-30% (automation reduces tickets)	\$XX,XXX/year
Development Efficiency	Fragmented tools	Unified platform	\$XX,XXX/year

Customer Cost Savings (drives retention & expansion):

Customer Segment	Manual Work Cost	Automation Savings	Annual Value
SMB	6 hours/day @ \$25/hour	75% reduction	~\$30K/year
Mid-Market	8 hours/day @ \$35/hour	80% reduction	~\$60K/year
Enterprise	10 hours/day @ \$50/hour	85% reduction	~\$110K/year

ROI Calculation

Investment Required:

- Internal development: \$X (engineering, product, design)
- External partnerships: \$Y (Deck, freight forwarders, EDI standards)
- Infrastructure: \$Z (cloud, AI/ML services)

- **Total Investment: \$X+Y+Z**

Expected Returns (Year 1):

- Revenue growth: +\$X million ARR
- Churn reduction: +\$Y million retained ARR
- New revenue (containers): +\$Z million
- Cost savings: +\$W million
- **Total Returns: \$X+Y+Z+W**

ROI: (Returns - Investment) / Investment = XX%

Payback Period: X-Y months

Competitive Metrics

Market Position Indicators:

Metric	Current	2026 Target
Win Rate vs. Competitors	X%	X + 15-20%
Enterprise Deal Cycle	Y days	Y * 0.7-0.8 (30% faster)
Feature Parity Score	70%	95% (industry-leading)
AI Capabilities Ranking	#3-4	#1 (market leader)

7. Success Metrics: Measuring Progress & Outcomes

North Star Metrics

Primary Success Metric:

- **Customer Efficiency Gain:** 70%+ reduction in manual supply chain work

Supporting Metrics:

- **Revenue Growth:** +25-40% ARR
- **Customer Retention:** +15-20% improvement
- **NPS:** +10-15 point increase

Initiative-Specific KPIs

1. Deck PO Input (Q1-Q2)

- Partnership signed and integration complete
- 80%+ customer adoption within 3 months of launch
- 90% time reduction validated (20-30 min → 2-3 min)
- Zero data entry errors reported

2. Email Analysis (Q2)

- 90%+ accuracy on high-confidence extractions
- 70%+ of emails auto-applied without review
- 90% time reduction validated (10-15 min → 1-2 min)
- Zero missed critical information incidents

3. EDI Integration (Q2-Q3)

- Third-party processor fully replaced
- 100% cost savings realized (\$XXX,XXX/year)
- Real-time processing (<5 min vs. hours/days)
- 95%+ EDI message processing accuracy

4. 3-Way Matching (Q3-Q4)

- Phase 1: 50% time reduction (30-60 min → 15-30 min)
- Phase 2: 80% time reduction (30-60 min → 5-10 min)
- 90%+ matching accuracy
- Payment delays reduced by 60%+

5. Container Optimization Pilot (Q3-Q4)

- 5-10 customers actively using
- 15-30% logistics cost savings demonstrated
- Positive customer feedback (NPS 8+)
- Revenue model validated (sustainable margin)

Platform-Wide Metrics

Operational Excellence:

- **System Uptime:** 99.9%+
- **AI Agent Accuracy:** 95%+ across all agents
- **Processing Speed:** <5 min for all automated workflows
- **Error Rate:** <0.1% for automated processes

Customer Adoption:

- **Feature Adoption Rate:** 80%+ of customers using 3+ new capabilities
- **Daily Active Usage:** 90%+ of customers engaging daily
- **Customer Satisfaction:** NPS 50+ (industry-leading)

Business Health:

- **ARR Growth:** +25-40% year-over-year
- **Gross Retention:** 95%+ (industry-leading)
- **Net Retention:** 120%+ (expansion revenue)
- **Customer Acquisition Cost:** -20% (efficiency gains)

Measurement Cadence

Weekly:

- Initiative progress tracking (milestones, blockers)
- Customer adoption metrics
- System performance and uptime

Monthly:

- Business metrics review (ARR, churn, NPS)
- Initiative KPI assessment
- Risk and dependency management

Quarterly:

- Strategic alignment review
 - ROI validation
 - Roadmap adjustments based on learnings
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8. Conclusion: Path to Market Leadership

Strategic Imperative

The supply chain SaaS market is at an inflection point. AI-powered automation is no longer a "nice-to-have"—it's table stakes for enterprise customers and a competitive necessity for survival.

This roadmap positions Optiply to:

1. **Lead the market** in AI-powered end-to-end supply chain automation
2. **Capture enterprise segment** with complete workflow automation
3. **Defend against competitors** with defensible platform moat
4. **Drive sustainable growth** through retention, expansion, and new revenue streams

Why This Roadmap Wins**Customer-Centric:**

- Solves real pain points (double data entry, manual processes, high costs)
- Delivers measurable value (70%+ efficiency gains, 15-30% cost savings)
- Scales with customer growth (SMB → Mid-Market → Enterprise)

Strategically Sound:

- Builds on existing strengths (inventory optimization, ERP integration)
- Leverages proven technology (LangGraph platform, AI/ML maturity)
- Sequences initiatives to minimize risk and maximize learning

Financially Compelling:

- Strong ROI (XX% return, X-Y month payback)
- Multiple revenue drivers (enterprise expansion, churn reduction, new revenue)
- Sustainable competitive advantage (platform network effects)

Next Steps

Immediate Actions (Next 30 Days):

1. Finalize Deck partnership agreement
2. Allocate engineering resources for Q1 initiatives
3. Begin customer pilot recruitment (Deck PO input, Email analysis)
4. Establish success metrics dashboard and tracking

Q1 2026 Milestones:

- Data-Quality Agent MVP operational
- Deck PO input pilot with 3-5 customers
- Email analysis proof-of-concept validated
- EDI integration architecture defined

Strategic Alignment:

- Monthly executive reviews to track progress
- Quarterly board updates on business impact
- Continuous customer feedback loops to refine roadmap