

DEMOCRATIZING OPTIMIZATION

OptiU Engagement Catalog

Your Path to the Decision Layer

From a 90-minute briefing to a fully deployed Decision Layer — a structured ladder of engagements that opens doors, builds trust, and scales into enterprise-wide AOM adoption.

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Document Purpose

This catalog is intended for executives and operating leaders evaluating where to start with OptiU — and for OptiU's go-to-market team, channel partners, and resellers presenting structured options to prospective customers.

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1. Executive Summary

OptiU is the autonomous Decision Layer for the enterprise. Across five vertical suites — OptiCare, OptiRetail, OptiManufacturing, OptiUpstream, and OptiRefinery — OptiU delivers more than 175 Autonomous Optimization Models (AOMs) that continuously decide the next best action under real-world constraints, sitting above existing Systems of Record and Systems of Insight.

But not every prospective customer is ready to begin with a multi-AOM deployment. The Decision Layer is a new category, and many executives — even those who instinctively recognize the gap between their dashboards and their decisions — need a low-friction way to enter the conversation, prove the thesis on their own ground, and earn the internal mandate to scale.

The OptiU Engagement Catalog closes that gap. It is a structured ladder of five engagement rungs — from a 90-minute Boardroom Briefing to a fully deployed AOM Suite — designed so that every engagement creates immediate, defensible value and naturally opens the door to the next.

WHAT THIS DOCUMENT COVERS

This catalog presents the five-rung OptiU Engagement Ladder, the package definitions for each rung, the industry- and buyer-specific overlays, the pricing logic, and the path by which each engagement ladders into full AOM Suite deployment.

It is intended as a self-contained executive read — typically 10–15 minutes — to inform a follow-on conversation with OptiU.

Who this catalog is for

- **Operators.** Operating leaders (COO, VP Operations, VP Supply Chain, Revenue Operations, CFO, CIO) who suspect their decisions are leaking value but don't know where to start.
- **Evaluators.** Mid-market and enterprise executives evaluating OptiU's vertical suites and seeking a low-risk, fast-feedback first engagement.
- **PE Operating Partners.** Operating partners at private equity firms looking for repeatable EBITDA-improvement plays across their portfolio.
- **Channel Partners.** ISVs, systems integrators, and resellers building services lines on top of OptiU's AOM catalog.
- **ERP-Frustrated Buyers.** Owners of mid-market companies running on D365, NetSuite, Sage, or SAP who are frustrated by the gap between what their ERP captures and what their organization actually decides.

Why a structured catalog matters now

OptiU's anchor accounts — Barn's, Real Cosmetics, Sub-Zero, Luma Health, BioGX, KOC — entered through different doors but converged on the same destination: embedded AOMs at the operational core. The Engagement Catalog formalizes that pattern. It gives the field team a coherent set of prices, scopes, and commitments at every entry point, eliminates bespoke

proposals, and turns the long enterprise sales cycle into a sequence of short, billable, value-producing engagements.

2. The Engagement Ladder

Every successful OptiU engagement to date has followed the same arc: a buyer who first encountered the Decision Layer concept, then ran a small, paid diagnostic on their own data, then commissioned a focused proof-of-value sprint, then embedded OptiU into their operating cadence, and finally scaled into a full AOM Suite deployment. The Engagement Catalog formalizes that arc into five named rungs.

2.1 The five rungs

Rung	Engagement	Customer's Question	Price	Duration
1	Opti Briefing	"What is the Decision Layer, and what could it mean for me?"	Free – \$10K	90 min
2	Opti Diagnostic	"Where in my operation would I start, and what's the ROI?"	\$10K – \$50K	1–2 weeks
3	Opti Sprint (3 variants)	"Does it actually work on my data, in my environment?"	\$25K – \$150K	2–4 weeks
4	OptiInsight + Opti Office	"How do I run with this day-to-day, before I'm ready for full deployment?"	\$2K – \$40K / month	6+ months
5	Opti Suite	"How do I make the Decision Layer my operating model?"	\$280K+ / \$15K+/mo	Ongoing

2.2 How the ladder is designed to work

Three principles govern the ladder. First, every rung must produce immediate, standalone value — a customer who stops at any rung must feel they got their money's worth. Second, every rung must reduce the perceived risk and increase the perceived feasibility of the next rung. Third, the catalog of AOMs in the underlying suites is the destination — every rung is engineered to reveal which AOMs are most relevant to the customer's value at stake.

Rung 1 → Rung 2

The Briefing creates buyer-side curiosity and credibility for OptiU. A well-run Briefing typically converts to a paid Diagnostic at >50% — not because of pressure, but because the executive team leaves with a structured view of where their decisions are leaking and a desire to put numbers behind it.

Rung 2 → Rung 3

The Diagnostic is the most important conversion event in the ladder. It produces three artifacts that drive Sprint demand: a Decision Landscape Map that shows the customer's full set of high-leverage decisions, a prioritized list of top-10 AOM candidates, and a 12-month roadmap with

ROI estimates. By the end of a Diagnostic, the customer has a specific decision they want to optimize first — and the natural next purchase is a Sprint that proves the optimization on real data.

Rung 3 → Rung 4

The Sprint produces a working artifact — a deployed tool, a live dashboard, a war-room playbook. It demonstrates concrete impact and surfaces the operating cadence the customer needs. The natural next step is either OptiInsight (a low-integration subscription that maintains decision visibility while the customer plans full deployment) or Opti Office (an embedded fractional optimization team).

Rung 4 → Rung 5

By the time a customer has been on Rung 4 for two to three quarters, the operating muscle is built, the data contracts are in place, and the executive team has lived with OptiU's recommendations long enough to commission a full AOM Suite deployment. Rung 4 is the bridge that turns proof-of-concept into operating model.

3. The Engagement Catalog

This section presents each engagement in detail. Every engagement entry includes the format, scope, deliverables, target buyer, pricing logic, duration, and the conversion path it opens to the next rung.

3.1 Rung 1 — Opti Briefing

A 90-minute executive session — virtual or on-site — in which OptiU translates the Decision Layer thesis into the customer's specific industry, operating model, and current pain points. The Briefing is not a generic pitch; it is a tailored briefing built from the customer's public information, industry context, and a short pre-call discovery.

Component	Detail
Format	90-minute session, virtual or on-site, with C-suite plus 2–3 operating leaders.
Pre-work	30-minute scoping call; OptiU prepares a tailored briefing deck mapped to the customer's industry suite (OptiCare / OptiRetail / etc.).
Deliverable	Tailored briefing deck (10–15 slides) covering: the three-layer enterprise architecture, the relevant suite catalog, 5–10 example AOMs mapped to the customer's operations, and a draft engagement path.
Outcome	Educated executive team, qualified pipeline opportunity, mutual fit assessment.
Pricing	Free for qualified mid-market and enterprise prospects (pipeline investment). \$5K–\$10K for SMBs or where pipeline qualification is uncertain.
Conversion target	>50% conversion to Opti Diagnostic within 60 days.

3.2 Rung 2 — Opti Diagnostic

A 1–2 week paid engagement that maps the customer's decision landscape, identifies the highest-leverage AOM candidates, and produces a 12-month roadmap with ROI estimates. The Diagnostic is the foundational entry point — the engagement that converts curiosity into commitment.

Format

2–3 days of on-site or virtual deep dive (operations walkthrough, decision interviews, data-flow mapping), followed by 5–7 days of analysis and a 1-hour C-suite readout.

Deliverables

- **Decision Landscape Map.** Visual artifact mapping the customer's top 10–20 high-value operational decisions across the value chain.
- **Top-10 AOM Candidates.** Prioritized list of the 10 most impactful AOM candidates from the relevant suite, ranked by feasibility, value, and time-to-value.
- **12-Month Roadmap.** Quarterly sequencing of AOM deployment, with ROI estimates, data dependencies, and integration touchpoints.

- **Quick-Win List.** Identified <30-day actions the customer can take immediately, even before a Sprint or Suite engagement begins.
- **Executive Readout.** 1-hour C-suite session presenting findings and recommended first-wave Sprint scope.

Pricing

Customer Profile	Price	Duration
SMB / Single-site operator	\$10K – \$15K	1 week
Mid-market / Multi-site	\$20K – \$35K	1–2 weeks
Enterprise / Multi-BU	\$35K – \$50K	2 weeks

Conversion target. >60% conversion to Opti Sprint, OptiInsight, or Opti Office within 90 days. The Diagnostic is also designed to be billable as paid discovery — even when no follow-on is signed, the customer leaves with a roadmap they paid for and can act on internally.

3.3 Rung 3 — Opti Sprint

A focused, time-boxed delivery engagement that produces a working artifact and demonstrates concrete impact on a specific decision. The Sprint comes in three variants, selected based on the customer's primary buying trigger.

3.3.1 Variant A — Spreadsheet-to-AOM Sprint

Replace one mission-critical spreadsheet-driven decision with an AOM-powered tool, deployed in the customer's environment. This is the highest-volume Sprint variant and the most reliable conversion path into full AOM Suite deployment.

Component	Detail
Trigger	Customer runs a critical operational decision (production scheduling, replenishment, pricing, staffing, allocation) in Excel or Google Sheets.
Scope	One decision, one AOM (drawn from the relevant suite catalog), wrapped in a lightweight web app + dashboard.
Deliverable	Working web app, optimization logic, dashboard, deployed in customer's environment with documented data contracts and override paths.
Outcome	Tangible KPI improvement (typically 5–15% on the targeted decision), proof of concept on real data, internal champion energized.
Price	SMB / single decision: \$25K–\$35K · Mid-market: \$35K–\$50K · Enterprise / complex constraints: \$50K–\$75K.
Duration	2–3 weeks.
Conversion target	>70% to Opti Office, OptiInsight, or full AOM Suite deployment.

3.3.2 Variant B — War Room Sprint

Crisis-mode optimization for a major operational disruption — a supply shock, a demand surge, a geopolitical event, an ERP outage, or an M&A integration shock. The War Room Sprint compresses 6–9 months of analytical workflow into 72 hours of decision-grade output.

Component	Detail
Trigger	Material disruption to the customer's operating environment — typically energy, manufacturing, logistics, or import/export under acute pressure.
Scope	72-hour scenario analysis + decision simulations + optimized action plan, followed by a 2-week execution-monitoring and re-planning window.
Deliverable	Scenario library, decision simulations, optimized action plan, live dashboards, daily readouts during the 2-week follow-on window.
Price	Mid-market: \$50K–\$75K · Enterprise: \$75K–\$150K (premium reflects on-call team, weekend/overnight cadence, and direct executive engagement).
Duration	3–5 day intense phase + 2-week follow-on.

Conversion target	>50% to Opti Office (customer wants the war-room cadence to continue post-crisis).
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3.3.3 Variant C — Decision Twin Sprint

An architectural mapping engagement for customers planning a 12–24 month transformation. Where the Diagnostic identifies the top-10 AOM candidates, the Decision Twin maps the full decision graph — every operational decision, every constraint, every dependency — and produces a multi-year AOM deployment architecture.

Component	Detail
Trigger	Customer is planning an enterprise transformation (post-M&A integration, capacity expansion, ERP migration, or Decision Layer adoption at scale).
Scope	Full operational decision map; constraint inventory; optimization graph; AOM prioritization matrix; multi-year ROI model.
Deliverable	Decision architecture document, optimization graph (visual artifact), AOM prioritization matrix, multi-year ROI model, governance recommendations.
Price	Mid-market: \$35K–\$50K · Enterprise / multi-BU: \$50K–\$100K.
Duration	3–4 weeks.
Conversion target	>80% to multi-AOM Opti Suite deployment (this variant is engineered to lead directly into a Suite engagement).

3.4 Rung 4a — Optilnsight

A subscription-based decision intelligence layer that requires no integration to begin. The customer sends periodic data exports or system snapshots; OptiU returns an executive narrative, KPI anomaly detection, prioritized recommendations, and a decision queue. Optilnsight is the lowest-friction path to a recurring relationship and the most reliable bridge from Sprint to Suite.

How it works

- **Inputs.** Customer sends exports from ERP, MES, POS, EMR, SCADA, or BI tools — weekly or bi-weekly.
- **Outputs.** OptiU returns: executive narrative; KPI anomaly identification with root-cause hypotheses; prioritized recommendations; decision queue; live dashboard access.
- **Cadence.** Bi-weekly readouts (30 minutes), with a quarterly executive review and roadmap update.
- **Integration.** No API integration required to begin. Real-time integration is the upgrade path into full AOM Suite deployment.

Pricing

Customer Profile	Setup	Monthly
SMB	\$5K	\$2K – \$5K
Mid-market	\$10K – \$15K	\$5K – \$10K
Enterprise	\$15K – \$25K	\$10K – \$15K

Minimum commitment. 6 months. Conversion path: customer typically upgrades to API integration and embedded AOMs within 9–12 months.

3.5 Rung 4b — Opti Office (Fractional Optimization Leadership)

A monthly retainer that gives the customer an outsourced optimization team — the equivalent of a Chief Optimization Officer plus a small analytical staff — without the cost or hiring lead time. Opti Office is the right offer for organizations that have committed to the Decision Layer thesis but cannot yet build their own internal optimization function.

What's included

- Weekly optimization reviews focused on the customer's 5–10 most consequential operational decisions.
- On-demand scenario simulation and decision support during disruptions, planning cycles, and material trade-offs.
- Quarterly KPI reviews and roadmap updates, presented to the executive team.
- Direct access to OptiU's optimization specialists — solver experts, constraint engineers, AOM developers — as part of the retainer.
- Embedded participation in the customer's existing PI, S&OP, or operations forums.

Pricing

Customer Profile	Monthly Retainer	Min Commitment
SMB	\$10K – \$15K	3 months
Mid-market	\$15K – \$25K	6 months
Enterprise / Multi-BU	\$25K – \$40K	6 months

Often runs in parallel with OptiInsight. OptiInsight provides the visibility layer; Opti Office provides the optimization team operating against it. Together they form a complete pre-Suite operating model.

3.6 Rung 5 — Opti Suite (Full AOM Deployment)

The destination rung. A full AOM Suite deployment — drawn from one or more of OptiU's vertical catalogs (OptiCare, OptiRetail, OptiManufacturing, OptiUpstream, OptiRefinery) — embedded into the customer's existing Systems of Record and Insight. This is OptiU's flagship offering and the model under which the company's anchor accounts are deployed.

Engagement model

Suite engagements follow OptiU's standard four-phase model documented in the suite-specific AOM Catalog briefs:

- **Phase 1 — Discovery.** 2–4 weeks. Confirm first-wave AOMs, data contracts, and operating cadences.
- **Phase 2 — Tailoring.** 4–8 weeks. Translate objectives and constraints into formal optimization models. Calibrate, validate against historical data.
- **Phase 3 — First-Wave Deployment.** 6–12 weeks. Embed first-wave AOMs into existing workflow surfaces with governance, override, and monitoring in place.
- **Phase 4 — Scale-Out.** Ongoing. Add adjacent AOMs, layer in orchestration AOMs, expand to multi-BU coverage.

Commercial model

Per the standard OptiU commercial framework: implementation fees in the \$280K+ range (varying by suite, scope, and complexity), monthly platform fees of \$15K+, and metered usage on top. Refer to the suite-specific AOM Catalog briefs for full commercial detail.

How customers arrive here. By the time a customer commissions an Opti Suite engagement, they have typically completed a Diagnostic (Rung 2) and one or two Sprints (Rung 3), and have been on OptiInsight or Opti Office (Rung 4) for at least one quarter. The result is a Suite engagement with pre-validated scope, pre-built data contracts, and pre-earned executive sponsorship — dramatically reducing implementation risk.

4. Industry-Specific Entry Points

Each rung of the ladder has industry-specific framings that translate the abstract Decision Layer thesis into the language and pain points of a specific vertical. The table below identifies the highest-conversion entry point for each industry and the suite catalog it leads into.

Industry	Recommended Entry	Highest-Value First Decision	Leads Into
Manufacturing	Spreadsheet-to-AOM Sprint	Production scheduling, OEE recovery, or replenishment.	OptiManufacturing (31 AOMs)
Retail & Distribution	Diagnostic + Spreadsheet Sprint	Pricing & markdown, replenishment, network balancing.	OptiRetail (22 AOMs)
Healthcare	Diagnostic + Sprint (RCM-focused)	Denial appeals, scheduling fill-rate, prior auth TAT.	OptiCare (63 AOMs)
Energy — Upstream	War Room Sprint or Decision Twin	High-cost well classification, intervention prioritization, surface-constraint absorption.	OptiUpstream (19 AOMs)
Energy — Downstream	Decision Twin + Briefing	Crude slate selection, blending margin, energy & hydrogen optimization.	OptiRefinery (40 AOMs)
Logistics & 3PL	Spreadsheet-to-AOM Sprint	Truck loading, dispatch, network flow.	OptiManufacturing / OptiRetail logistics AOMs
Mid-Market (cross-vertical)	Opti Decision Rescue (ERP bundle)	Whichever decision the ERP fails to support — typically planning, allocation, or pricing.	OptiNexus + relevant vertical AOMs

4.1 Industry-specific Sprint examples

Manufacturing

A premium-appliance manufacturer running production scheduling in Excel commits to a Spreadsheet-to-AOM Sprint. In 3 weeks, OptiU replaces the planner's spreadsheet with a deployed AOM (analogous to OptiManufacturing's SCHED_01 and THROUGHPUT_01) that produces optimized schedules every hour. Tangible outcome: 8–12% throughput uplift on the targeted line within 30 days. Conversion path: full OptiManufacturing Suite deployment.

Retail

A multi-store retailer struggling with markdown discipline commissions a Diagnostic, identifies pricing and markdown as the top AOM candidate, and follows with a Spreadsheet Sprint. OptiU stands up a pricing AOM analogous to OptiRetail's PRICING_01, applied first to a single

category. Tangible outcome: 1–3% gross margin improvement on the pilot category. Conversion path: full OptiRetail Suite, expanding category by category.

Energy — Upstream

A national operator under acute production pressure commissions a War Room Sprint. OptiU stands up a 72-hour decision war room covering well-by-well classification, intervention sequencing, and facility-constraint absorption. Tangible outcome: production protection through the disruption window plus a documented playbook for the next event. Conversion path: Opti Office + selective AOM deployment from the OptiUpstream catalog.

Healthcare

A health system or RCM operator commissions a Diagnostic, identifies denial appeals or scheduling fill-rate as the top AOM candidate, and follows with a Spreadsheet Sprint embedding an OptiCare AOM (DENROOT_01, APPEAL_01, or SCHED_01). Tangible outcome: measurable change in denial overturn rate or fill rate within 60 days. Conversion path: HRMD JV pathway into broader OptiCare deployment.

5. Buyer-Segment Plays

Two buyer segments deserve dedicated, productized overlays on top of the standard ladder: private equity operating partners (where the buying motion is portfolio-wide) and ERP-frustrated mid-market buyers (where the buying motion is wrapped around an existing system pain). Both are packaged as turnkey SKUs to remove friction.

5.1 Opti Portfolio EBITDA Diagnostic — for PE Operating Partners

A multi-portco diagnostic that gives PE operating partners a structured, repeatable EBITDA-improvement play across their portfolio. Designed to be commissioned at the portfolio level, executed across 3–5 portcos in parallel, and reported through a single executive summary.

Component	Detail
Buyer	PE operating partner, value creation lead, or operating committee.
Scope	3–5 portfolio companies; one Diagnostic per portco; one portfolio-level synthesis.
Per-portco deliverable	Decision Landscape Map; top-3 AOM candidates; EBITDA impact estimate; quick-win list.
Portfolio deliverable	Cross-portfolio prioritization; replicable Decision Layer playbook; suggested first-wave Sprint targets.
Pricing	3 portcos: \$50K–\$75K · 5 portcos: \$100K–\$150K. Customarily billed to the PE firm and recharged to portcos.
Duration	4–6 weeks elapsed (portcos run in parallel).
Follow-on	Each portco enters the standard ladder. PE firm receives quarterly portfolio reviews. Repeatable across funds.

5.2 Opti Decision Rescue — for ERP-Frustrated Mid-Market Buyers

A turnkey bundle for mid-market companies running on Microsoft D365, NetSuite, Sage, or SAP who have hit the ceiling of their ERP — too many reports nobody uses, planning that lives in spreadsheets, decisions that lag the data. Decision Rescue wraps the ladder's first three rungs into a single SKU and explicitly positions OptiU as the Decision Layer above the ERP — not a replacement.

Component	Detail
Buyer	CFO, COO, CIO, or VP Operations at a mid-market company on D365 / NetSuite / Sage / SAP.
What's included	Opti Diagnostic + Spreadsheet-to-AOM Sprint + 3-month OptiInsight subscription, bundled at a fixed price.
Positioning	Explicit non-replacement of ERP. OptiU sits above the ERP as a decision layer — answering what the ERP cannot.

Pricing	\$50K – \$100K turnkey. Pre-paid as a bundle to remove procurement friction; OptiInsight months 4+ continue at standard subscription rate.
Duration	8–10 weeks elapsed.
Conversion path	Natural progression to Opti Office or OptiNexus / vertical-suite deployment.

5.3 SMB & Single-Site Operators

For SMBs (single-site or sub-\$50M revenue), the entry SKU is a fixed-price Spreadsheet-to-AOM Sprint at \$25K, optionally preceded by a \$10K Diagnostic. OptiInsight is the natural recurring product at \$2K–\$5K per month. Opti Office is generally not SMB-appropriate; SMBs that scale should graduate into mid-market commercial terms.

6. Pricing & Commercial Models

6.1 Master pricing matrix

Engagement	SMB	Mid-Market	Enterprise	Duration
Opti Briefing	\$5K	Free	Free – \$10K	90 min
Opti Diagnostic	\$10K – \$15K	\$20K – \$35K	\$35K – \$50K	1–2 weeks
Spreadsheet-to-AOM Sprint	\$25K – \$35K	\$35K – \$50K	\$50K – \$75K	2–3 weeks
War Room Sprint	—	\$50K – \$75K	\$75K – \$150K	3–5 days + 2 wk
Decision Twin Sprint	—	\$35K – \$50K	\$50K – \$100K	3–4 weeks
Optilnsight (setup + monthly)	\$5K + \$2–5K/mo	\$10–15K + \$5–10K/mo	\$15–25K + \$10–15K/mo	6+ months
Opti Office (monthly)	\$10–15K	\$15–25K	\$25–40K	3–6 months
Opti Suite (full AOM deployment)	—	\$280K+ + \$15K+/mo	\$1M+ + metered	Ongoing
Opti Portfolio EBITDA (PE)	—	\$50–75K (3 portcos)	\$100–150K (5 portcos)	4–6 weeks
Opti Decision Rescue (ERP)	—	\$50K – \$100K	\$50K – \$100K	8–10 weeks

6.2 Commercial principles

- **List pricing.** All prices are list prices and assume standard commercial terms. Channel-partner, JV-partner, and PE-portfolio terms vary.
- **Billing.** Diagnostic, Sprint, and bundle engagements are billed 50% on contract / 50% on delivery. Subscription engagements (Optilnsight, Opti Office) are billed monthly in advance with the minimum-commitment period locked.
- **Scope discipline.** Each rung's deliverables are explicitly defined and contractually committed. There is no "open scope" or "time and materials" tier. Customers always know what they are buying and when it will be delivered.
- **Credit toward Suite.** If a customer signs an Opti Suite engagement within 90 days of completing a Diagnostic or Sprint, the full Diagnostic / Sprint fee credits toward Suite implementation. This makes the entry rungs effectively risk-free for committed buyers.
- **Channel & JV terms.** Channel partners, JVs (HRMD, Floris, Z2Ventures), and resellers receive standardized commercial wrappers around this catalog, with margins set at the partner-agreement level.

7. How Engagements Ladder into AOM Deployment

The Engagement Catalog is not a separate product line. It is the on-ramp to OptiU's AOM catalogs. Every rung is engineered to surface, validate, and then deploy specific AOMs from the relevant suite. The table below illustrates the typical flow.

Rung	AOMs Surfaced	AOMs Validated	AOMs Deployed
1 — Briefing	5–10 illustrative AOMs from the relevant suite, mapped to the customer's operations.	None.	None.
2 — Diagnostic	Top-10 AOM candidates, prioritized by feasibility, value, and time-to-value.	None — but ROI estimates produced.	None.
3 — Sprint	(Already known from Diagnostic.)	1 AOM validated on real data, in the customer's environment.	1 AOM deployed (often as a lightweight web app first, then as embedded AOM).
4 — OptiInsight + Office	Adjacent AOMs become visible through ongoing decision support.	2–5 additional AOMs validated through OptiInsight readouts.	0–2 additional AOMs deployed selectively.
5 — Suite	Full suite catalog available.	First-wave AOMs validated during Tailoring phase.	First-wave AOMs deployed; scale-out adds adjacent AOMs continuously.

7.1 Why this matters for the field team

Every engagement, regardless of rung, must produce one critical artifact: a list of AOMs the customer would deploy next. That artifact is the bridge between the engagement and the Suite. A Sprint that delivers a working tool but does not produce a clear next-AOM list has under-delivered. A Diagnostic that produces a great Decision Landscape Map but does not name the top-10 AOMs has under-delivered. The catalog is engineered so that every rung produces this artifact by design.

8. Engagement & Path Forward

OptiU engagements are designed to deliver visible operational impact within a single quarter and compound from there. The Engagement Catalog gives every prospective customer — from a \$20M SMB to a Fortune 500 enterprise — a structured, predictable, and reversible path into the Decision Layer.

8.1 What we ask of partners and customers

- A clear executive sponsor who owns the operational outcome — not only the technical integration.
- Access to the relevant Systems of Record and Insight at the cadence the chosen rung requires.
- A small, empowered cross-functional team to participate in tailoring, validation, and governance design.
- A willingness to evolve operating forums from coordination to decision validation as engagements progress up the ladder.

8.2 Recommended next step

The recommended next step depends on where the customer is starting from.

If you are...	Recommended next step
Just learning about OptiU	Schedule an Opti Briefing — 90 minutes, no commitment.
Convinced of the thesis, unsure where to start	Commission an Opti Diagnostic.
Sitting on a known operational pain point	Go directly to a Spreadsheet-to-AOM Sprint.
Operating under acute disruption	Commission a War Room Sprint.
Planning a multi-year transformation	Commission a Decision Twin Sprint.
A PE operating partner	Commission an Opti Portfolio EBITDA Diagnostic.
Frustrated with your ERP	Commission an Opti Decision Rescue.

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