Raydiant

THE OS FOR
REAL-WORLD EXPERIENCES

Our Mission

Empower brands to increase sales and engagement through powerful tools; uniting online and offline experiences to create stronger, profitable relationships with customers.

This is the only platform that has been able to tie our online marketing to our in-location marketing and visibly increase revenues.

Pizza Ranch

Raydiant

BUSINESS SCREENS

Massive, Underserved Market

B2C: HUGE MARKET, WELL SERVED

Apple TV

21.3M

Amazon Fire TV

35.8M

Google Chromecast

36.9M

Roku

38.9M

B2B: MASSIVE MARKET, HELD BACK BY LEGACY SOLUTIONS

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>250M

SCREENS SOLD PER YEAR

>50%

OF THOSE SCREENS ARE SOLD TO BUSINESSES

$1.2T

OPPORTUNITY

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Source: 2018 Living Room Set Top Box Data from eMarketer

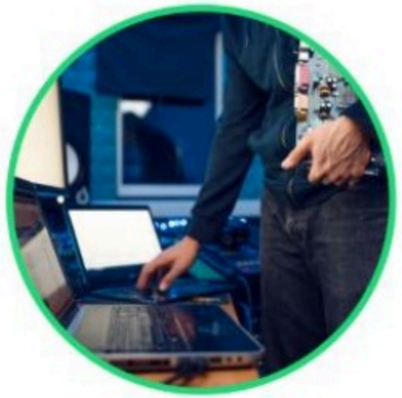
Privileged & Confidential

THE PROBLEM

But Businesses Face Many Challenges with Existing Solutions

UNRELIABLE

NO APP ECOSYSTEM



NOT PLUG + PLAY

COMPLEX TO BUILD OWN SYSTEMS

NO WAY TO ENGAGE WITH CUSTOMERS

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Problem vs. Solution

A fractured complicated solution that requires management of different technologies, content and over $6B to put together.

COST: $$$$$

AVG. BUILD OUT TIME: 450 DAYS

Interactive Kiosk | Digital Signage | Virtual Agent | Content & Music

COST: $$$

AVG. BUILD OUT TIME: 18 DAYS

The Operating System For Real-World Experiences

THE EXPERIENCE PLATFORM

Sound

Kiosk

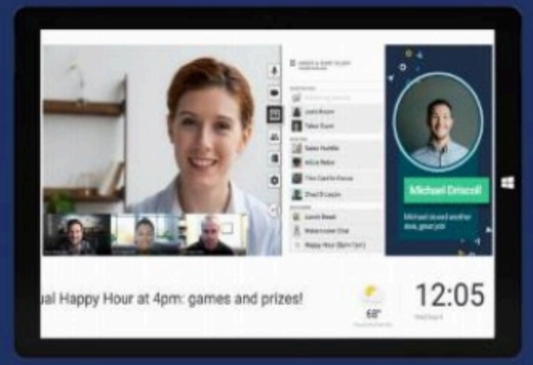
Virtual Agent Platform

Digital Signage

App Marketplace

Automated Content

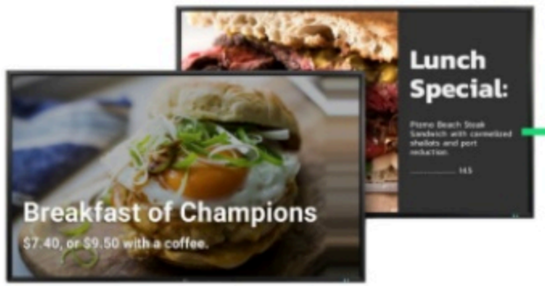
THE EXPERIENCE PLATFORM FOR WORK



SECONDSCREEN
BY RAYDIANT

The Path To Lead The Market

OWN THE SCREEN



$32B

OPPORTUNITY

OWN THE STORE

$410B

OPPORTUNITY

OWN THE CHAIN

$1.2T

OPPORTUNITY

CONNECTING THE REAL WORLD

Easy, Secure, Plug-and-Play IOT

What others did for...

WiFi... Meraki

Trucks... samsara

POS... Square

Streaming TV... Roku

...We will do for real-world experiences

Raydiant

EXPERIENCE PLATFORM

Raydiant OS fully integrated with our own hardware: We built the OS to manage these devices instead of software to install on hardware. Everyone sells an incomplete bundle. Either just the software (*e.g.,* Four Winds Interactive), which you need to install yourself on your own equipment or just the hardware (*e.g.,* Brightsign), which focuses on hardware and effectively requires your own software to use it. The cloud entrants only focus on basic digital signage.

Enterprise Grade Fleet Management: Make it easy for small and large organizations to fleet manage tens, hundreds or thousands of devices. The key incumbent digital signage platforms still rely on local, on-premise equipment deployments, requiring truck rolls and expensive local contractors to service and support screens.

Interactivity: Users need to be able to interact with screens locally. Raydiant has already added interactivity to the platform in the form of Kiosk touch controls for automated, interactive experiences and Video Conferencing features so that businesses can engage in two-way communications with their customers.

Device-to-Device (D2D) Control Channels: To create a truly immersive end-user experience, multiple screens need to be able to work together in a coordinated manner. Additionally, by enabling mobile devices to seamlessly connect to a Raydiant screen with a simple tap, we can enable a level of control and personalization of the screen.

RETAIL, RESTAURANT/QSR

WAHLBURGERS

REALTREE

FARM STORES

TOWNCENTER COLD PRESSED. COFFEE • JUICERY

Pizza Ranch

BANKING & CORPORATE OFFICE

Bank of America

Red Bull

LIBERTY BANK

FIRST BANK

Rockford Fosgate

HEALTH & WELLNESS

planet fitness

24/7 Colorado fitness

HOSPITALITY & ENTERTAINMENT

KILN CREEK GOLF CLUB & RESORT

Come Play! DOVER DOWNS HOTEL & CASINO

ti TREASURE ISLAND Las Vegas

DIGITAL OUT OF HOME (DOOH) ADVERTISING

Advantage

EPUERTO .COM marketing & digital solutions

CRANE + GREY

EDUCATION

CHADRON STATE COLLEGE

PRINCETON UNIVERSITY

VE RI TAS HARVARD

”

Experiences are really important to Mark. Raydiant is the only platform that has been able to create a true experience in our locations — which in turn have resulted into more revenue but also into repeat visits from our customers.

Wahlburgers

RETAIL, RESTAURANT / QSR

wahlburgers

Our Family. Our Story. Our Burgers.

”

I keep waiting for them to say ‘No, you can’t do this, you can’t do that’ with Raydiant, but the truth is...you can pretty much do anything. We started with digital signage, added kiosk technology and now our tellerless solution.

First Bank

BANKING & CORPORATE OFFICES

FIRST BANK

”

Raydiant has helped us create so much excitement on our casino floor by highlighting our jackpot winners, pushing out instant promos and bringing an element of instant fun whenever and wherever we want to create that.

Treasure Island

HOSPITALITY & ENTERTAINMENT

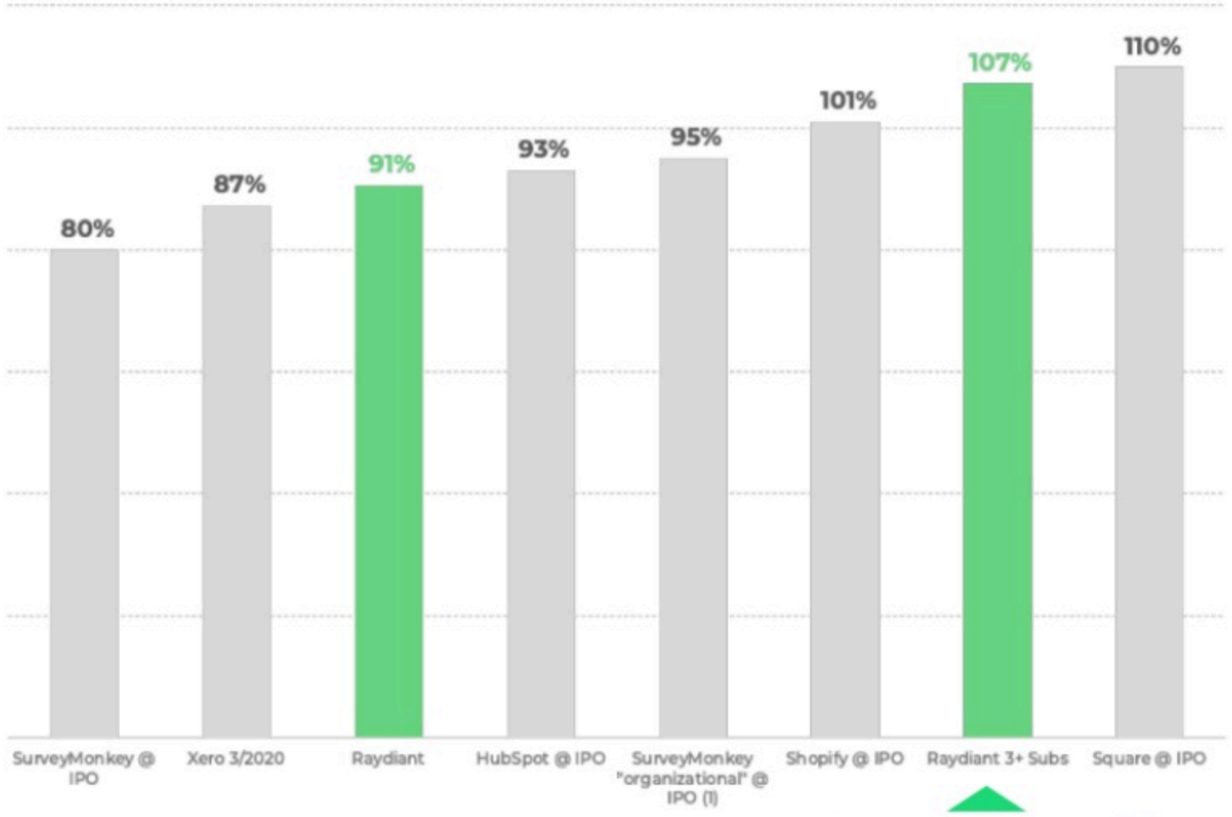
ti TREASURE ISLAND Las Vegas

STRONG RETENTION, PARTICULARLY CUSTOMERS WITH 3+ SCREENS

Raydiant Has Market-Leading Net Dollar Retention

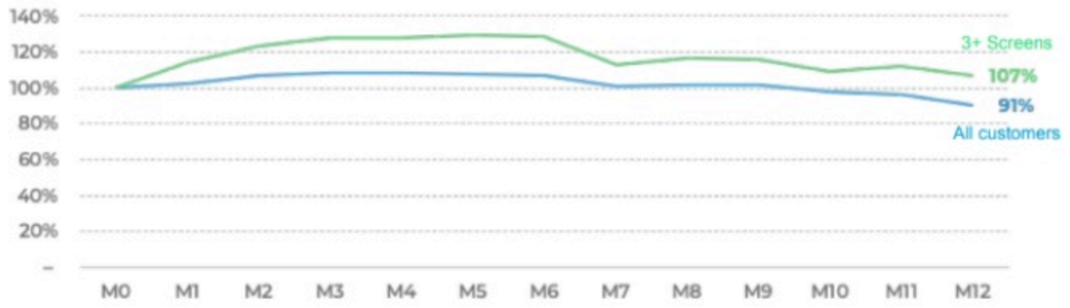
RAYDIANT IS A MARKET LEADER IN NET DOLLAR RETENTION

1Y Net Dollar Retention Benchmarking for SMB-Focused Companies



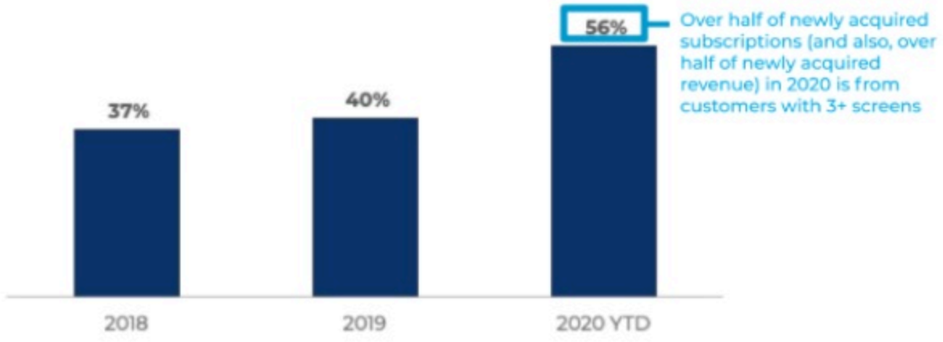
CUSTOMERS WITH 3+ SCREENS OUTPERFORM

All-customer and 3+ screen net revenue retention curves



SHIFTING OUR BUSINESS MIX TO CUSTOMERS WITH 3+ SCREENS

% of new subscriptions with 3+ screens



Note: Net dollar retention compares cohort revenue vs. the period 12 months prior. Raydiant statistics include all available sufficiently-aged cohorts (data begins February 2018 and runs through August 2020).
(1) Surveymonkey labels customers as "organizational" if they sign up with emails with domains that are not Gmail, Yahoo or other free services.

Competition

	CLOUD-FIRST			LEGACY		
	Raydiant	**Enplug**	**ScreenCloud**	**Brightsign**	**Four Winds Interactive**	**Scala**
Pricing	$$	$$$	$	$$$	$$$$$	$$$$$
Embedded OS	RaydiantOS (embedded Linux)	n/a (Androidapp)	n/a (Windows/Android app)	Brightsign OS (based on Roku)	n/a (Windows app)	n/a (Windows app)
IoT Optimized OS	Yes	-	-	-	-	-
Hardware Platform	Dedicated hardware (x86)	nVidia game console	PC, Smart TV or Android device selected by customer.	Dedicated hardware (ARM)	PC	PC
Onboarding Time	5 min	15 min	30-45 min (depending on host hardware of choice)	Months w/ deployment consultation	Months w/ deployment consultation	Months w/ deployment consultation
Content Management System	Yes	Yes	Yes	-	Yes	Yes
Basic Digital Signage (Pictures, Videos)	Yes	Yes	Yes	Yes	Yes	Yes
Multizone Support	Yes	Yes	Yes	Yes	Yes	Yes
Touch Support	Yes	Yes	-	Yes	Yes	Yes
Kiosk Designer	Yes	-	-	-	-	-
Virtual Agent Platform	Yes	-	-	-	-	-
B2B Music & Music Videos Service	Yes	-	-	-	-	-
Automated Digital Menu Updates	Yes	-	-	-	-	-
Point-of-Sale Integration	Yes	-	-	-	-	-
LTE Support	Yes	-	-	-	-	-
Automated Content Services	Yes	-	-	-	-	-

Raydiant

OUR TEAM

Experienced Leadership Team

Bobby Marhamat
CEO

- COO, Revel
- CRO, Highfive
- SVP, Verizon

Tuan Ho
CPO

- Co-Founder/CEO at Philo
- Harvard '09

Cameron Essalat
VP Sales

- VP Sales at MindTickle
- VP Sales at Catchpoint Systems

Mak Tadavani
VP Operations

- VP of Global Operations & Fulfillment, Revel
- Head of Operations, Target

David Phipps
VP Engineering

- Symantec, VP Cloud Engineering
- Oracle, Sr. Dir. Eng.
- Amazon, Sr. Eng. Manager

Jack Abraham
Founder, Atomic

- Co-Founder, TalkIQ/VoiceAI (acq. Dialpad for $50MM)
- Founder/CEO, Milo (acq. eBay for $75MM)

Mark Wahlberg
Advisor

- Co-owner of Wahlburgers
- Executive producer/actor
- Songwriter, singer, model, & rapper

Revel SYSTEMS philo MindTickle Revel SYSTEMS amazon ATOMIC Sibling rivalry. Well done. WAHLBURGERS

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