

# OuroDocs Partner Starter Kit

Sales-ready overview, scripts, wedges, and next steps

Version: 2026-03-01 | Website: [ourodcs.com](https://ourodcs.com) | Portal: [portal.ourodcs.com](https://portal.ourodcs.com)

## 1) One-sentence positioning

OuroDocs is a managed document processing service: clients send messy PDFs/scans/photos, and we return organized, searchable documents plus structured outputs (like spreadsheets) and complete packets—so teams stop drowning in paperwork.

## 2) What we deliver

- Searchable documents (OCR as needed)
- Clean organization (consistent naming + folder structure)
- Data extraction (CSV/Excel-ready outputs for common fields)
- Packet building (group related documents into a complete set)
- Recurring monthly processing (subscription + overages)

## 3) Pricing (current)

- \$100/mo includes 200 documents, then \$0.20/document overage
- \$200/mo includes 800 documents, then \$0.10/document overage

### What counts as a “document”?

A document is typically one uploaded file (PDF, scan, photo, form). Define the rule once with the client and keep it consistent.

## 4) Wedge library (pick ONE to start)

Partners close faster when they lead with a specific wedge. Start with one lane for the first 2 weeks, then expand.

### Track A: Retail / consumer-adjacent / service businesses

- Auto dealerships (sales/F&I): deal jacket packets + searchable archive
- Dental/medical offices: intake packets + insurance docs organized
- Home services (HVAC/plumbing/contractors): job packets (invoices/receipts/warranties/permits)
- Local agencies (marketing/recruiting/consulting): client files standardized + searchable delivery packets

## **Track B: Back-office B2B (fastest closes)**

- Bookkeeping/accounting: monthly receipts/invoices -> organized folders + spreadsheet export
- Property management: tenant/applicant packets + vendor invoices
- Construction back office: job packets (invoices, lien waivers, COIs)
- Insurance/claims support: claim packets compiled + searchable
- Legal intake/small firms: case packets + searchable archive

## **5) How it works (client process)**

- 1 Client sends documents (upload/shared folder/email process as configured).
- 2 OuroDocs processes and normalizes the files (searchability, organization, extraction/packets as needed).
- 3 Client receives clean outputs (organized folder set, searchable PDFs, extracted CSV/Excel, and/or packet PDFs).
- 4 Subscription renews monthly; overages apply only after included documents are exceeded.

## **6) Discovery questions (qualify fast)**

- How many documents do you handle per week/month?
- Where do they come from (email, scans, photos, exports)?
- Who currently sorts/names/files them?
- How often do you re-key data into spreadsheets or systems?
- What's the biggest pain: volume, speed, retrieval, or accuracy?
- Do you need complete "packets" (billing, compliance, audits, claims, deal jackets)?
- What turnaround do you need (same day vs 24–48h)?
- Who signs off on services like this (owner, controller, office manager)?
- Roughly how many hours/week are spent on document handling today?
- Do you want organized/searchable docs only, or also spreadsheet exports?

## **7) Objection handling (technical but simple)**

### **“Google/Adobe/Azure already does OCR.”**

Those are tools/engines. OuroDocs delivers the managed workflow and business-ready outputs: consistent organization, extraction, packet building, and less admin labor.

### **“We already have a process/system.”**

We don't replace their system—we remove the manual glue-work around it. Most clients keep their systems and use OuroDocs to make inputs/outputs clean and consistent.

## **Security / confidentiality**

Use sanitized examples. For real client data, use an NDA and follow least-privilege access. Do not promise certifications you don't have; focus on controlled access and process discipline.

## **Accuracy**

We aim for high quality and consistent output. For extraction fields, define required columns and flag exceptions rather than guessing silently.

## **8) Outreach scripts (starter set)**

### **Cold email – Track A (service businesses)**

Subject: Reduce paperwork overload (fast)

Hi {{Name}} — quick question: are you still spending staff time sorting/rename/scanning docs (invoices, forms, receipts)?

OuroDocs is a managed service: send docs → get them back organized + searchable, with optional spreadsheet exports and packets. Plans start at \$100/mo.

Worth 10 minutes to see if it fits your workflow?

### **Cold email – Track B (back-office)**

Subject: Turn document chaos into clean outputs

Hi {{Name}} — we help teams handling recurring paperwork (invoices/receipts/forms) by turning messy docs into organized folders + searchable PDFs + spreadsheet-ready exports.

It's a managed service (not another tool to configure). Starts at \$100/mo (200 docs).

Open to a quick call to see if this would save your team time each month?

### **Call opener (works for both)**

I'll be brief—do you have a recurring flow of documents each week that someone has to sort, rename, and chase? We remove that workload and return clean, usable outputs.

## **9) Sample pack (before/after)**

- Use fictitious/sanitized documents to avoid privacy issues.
- Send a small input set (6–10 files) and include the output bundle:

- extracted.json (metadata + extracted text + artifact pointers)
- extracted.txt (plain text)
- processing\_report.json (run summary)
- forms.json (PDF form fields, if present)
- bundle.zip (all artifacts in one file)

## **10) 14-day activation plan (keep partners moving)**

- 1 Day 1: Pick one wedge + build a target list (50+).
- 2 Day 3: Run first outreach batch (20–30 touches).
- 3 Day 7: Book 1–2 discovery calls.
- 4 Day 14: Push for first paid client (or 1–2 proposals in flight).

## **11) Partner program summary (commission-only)**

Use your current tier rules. Example structure:

- Start tier: 20% commission
- After first paying client: 35% lifetime commission (subscription + overages)
- Producer accelerator: 50% lifetime commission after 5 active paying clients during the promo period (subscription + overages)
- Payouts: monthly on collected revenue; exclude refunds/chargebacks/taxes

## **12) Next steps**

- Pick a wedge + target list
- Use the scripts to start outreach
- Book discovery calls; gather sample docs (sanitized) if needed
- Share questions/edge cases early so we can refine messaging and outputs