

COUNTER INTELLIGENCE REPORT

Pre-Pilot Discovery — What 211 minutes of in-store audio revealed before a single Zeno-deployed device went live.

Prepared for	Zeno Health Leadership
Prepared by	Ostronaut, Inc.
Period	March 7 – 10, 2026
Source	Founder-led store visits, ambient audio capture
Engine	Ostronaut Polyglot AST + multi-agent classifier
Status	Pre-pilot — device fleet ships in 2 weeks

This document contains paraphrased, English-translated summaries of in-store conversations. No verbatim audio quotes are reproduced. All store identifiers, customer names, and phone numbers have been redacted. Audio retention follows the privacy controls described in the pilot proposal.

EXECUTIVE SUMMARY

What we heard

Across **39 distinct counter sessions** totalling **211 minutes of speech** and **1493 transcribed turns**, the Ostronaut engine surfaced six distinct revenue-leaking failure modes that are presently invisible to Zeno HQ. Five are coaching-addressable; one is an ops-systems request. Every event was code-switched between Hindi and English — a regime that off-the-shelf conversation-intelligence tools (Gong, Observe.AI, Chorus) do not handle.

Counter sessions analysed	39
Total speech captured	211 min
Conversation turns	1,493
Failure modes documented	6
Coaching-addressable	5
Events visible to Zeno HQ today	0

The single most important finding

In a Mar 9 recording, a Zeno-class counter pharmacist tells a customer that a prescribed medicine is unavailable, that the order was never placed, and that the customer should try the homeopathy outlet nearby. Moments later, a colleague at the same counter asks aloud:

“How many customers are bouncing from us?”

Nobody on the floor can answer the question. No system at Zeno HQ can answer it either. The pilot exists to answer it — store by store, shift by shift, every day.

METHOD

How the engine reads the floor

The Ostronaut engine that processed this corpus is the same engine that has run in production for the last 10 months at India's largest cardiac care network, where hallucinated dosages are not survivable errors. Three guarantees come with that pedigree:

Schema-validated outputs

Every classified event is validated against a Pydantic↔Zod paired schema. Outputs that fail schema are rejected before they reach the dashboard.

Source-anchored

Every event in this report is anchored to a source segment ID and timestamp in the recorded audio. Original audio is retained and re-playable for review.

Code-switched native

Hindi-English code-switching, which is universal in this corpus, is handled in the transcription layer, not patched in afterwards.

Pipeline (per session): audio capture → Whisper transcription → code-switched normalization → multi-agent classification (parser, validator, taxonomy classifier) → schema-validated event record → coaching micro-module recommendation. Mean latency on this corpus: under two minutes per session, end-to-end.

A note on consent and privacy

The audio used for this discovery was captured with founder presence during in-store visits, on a wearable device held by the founder. Customer audio is paraphrased and translated; no verbatim Hindi audio or personally identifying information is preserved in this artifact. For the production pilot, in-store consent signage and audio retention policy are Zeno Health's responsibility per the pilot proposal; Ostronaut provides the technical controls (90-day retention, purge-on-request, no audio export to third parties).

FAILURE MODE — FM-01

Stockout-to-Competitor Leakage

Definition

When a requested medicine is out of stock or the back-order was never placed, staff redirect customers to nearby competitor or alternative outlets instead of capturing demand into a back-order, notify-when-available, or substitution flow.

Illustrative event (paraphrased)

A pharmacist confirms a prescribed medicine is unavailable and explains the back-order was never placed, so the item will not arrive. The customer is told to try the homeopathy outlet nearby. Moments later, a colleague at the counter asks aloud: “how many customers are bouncing from us?” — acknowledging the pattern. No system answers the question.

Where it appeared	Sessions #31, #72
What it costs	Every redirected customer is a lost SKU sale and a deteriorated lifetime relationship. Staff acknowledge the pattern in real time but no system measures the magnitude.
Coaching response	“Save the Sale” — back-order capture, notify-when-available outreach, comparable-SKU substitution script, manager escalation when out-of-stock crosses threshold.

FAILURE MODE — FM-02

Counter ↔ Online/Delivery System Mismatch

Definition

Counter inventory and the online/delivery (OD) system disagree on stock state. Staff make manual judgment calls about which to trust; customer-facing confusion follows; no SOP, no logging.

Illustrative event (paraphrased)

Mid-conversation about a returnable strip, a staff member proposes looking up the SKU in the OD system instead of the counter, after neither could agree on availability. The staff member resolves it by judgment. The customer is given an answer; the underlying mismatch is never logged or fixed.

Where it appeared	Sessions #48
What it costs	Customer trust erodes; orders are duplicated or dropped; high-value customers receive different answers depending on which channel they used.
Coaching response	“Single Source of Truth” — escalation path when systems disagree, customer-facing communication script, structured ticketing back to ops so the underlying mismatch can be diagnosed.

FAILURE MODE — FM-03

Return-Fraud Absorbed Silently

Definition

Customers return strips claiming partial use; staff manually verify the claim (counting tablets, inspecting packaging). When the claim is false, the strip is processed as damage/return. No system tracks fraud patterns or trains staff on dispute handling.

Illustrative event (paraphrased)

A customer returns a 60-tablet strip claiming a single tablet was consumed and caused a “heavy feeling.” Two staff members stop their workflow to count tablets one by one. All sixty are present — the strip was never opened. The strip is processed as damage/return. No fraud-pattern alert. No policy update.

Where it appeared	Sessions #48
What it costs	Inventory damage absorbed as cost-of-doing-business; no policy adjustment loop; staff develop ad-hoc heuristics that vary by store and shift.
Coaching response	“Verify Before Refund” — counting protocol, customer de-escalation script, fraud-pattern flagging that surfaces repeat offenders to manager dashboards.

FAILURE MODE — FM-04

Substitution Without SOP

Definition

Staff substitute branded vs generic medicines based on individual judgment, with no documented SOP and no consistent customer-facing explanation. Significant revenue, compliance, and customer-trust implications.

Illustrative event (paraphrased)

A staff member explains BP medication equivalence to a customer: “these are the same medicine — same composition, same 50 mg power; one is branded, one is generic.” The customer accepts. There is no audit trail of the substitution, no consistent script across staff, and no margin-aware rule about which generic to default to.

Where it appeared	Sessions #39
What it costs	Margin variance between branded and generic substitution is captured by individual staff judgment, not policy. Customers who get conflicting explanations across visits lose trust.
Coaching response	“Substitution Conversation” — when substitution is appropriate, customer-comfort script, regulatory disclosure where required, margin-aware default ordering.

FAILURE MODE — FM-05

Off-Peak Underutilization

Definition

Footfall is concentrated at narrow peak windows (typically 9:00 and 10:30); the rest of the day is, in staff's own words, "completely calm." Online orders absorb the rest; floor staff are present but unmonetized for ~60–70% of the shift.

Illustrative event (paraphrased)

A senior staff member explains daily traffic patterns: peaks at 9:00 and 10:30, then "it is completely calm — no one comes for medicine, online captures the rest." The off-peak hours are never reallocated to revenue-recovery work.

Where it appeared	Sessions #34
What it costs	Floor labor cost is fixed; revenue capture during off-peak is near-zero. The unused capacity is the largest underexploited resource on the store P&L.;
Coaching response	"Off-Peak Activation" — stockout audits, customer-callback campaigns for high-intent visitors who failed to convert, lapsed-prescription follow-ups, hyperlocal awareness of nearby clinic schedules.

FAILURE MODE — FM-06

Cash/Digital Reconciliation Drag

Definition

Manual reconciliation of cash, UPI, card, and online-order settlements happens verbally and on paper, often mid-shift, with errors and lost time.

Illustrative event (paraphrased)

A staff member walks through a verbal reconciliation across nine amounts — “43 online, 420, 198, 297, 148, 251, 42 cash; 6076 minus 432; 42 cash remaining” — in the middle of an active shift. No tooling support. Errors absorbed, not surfaced.

Where it appeared	Sessions #41
What it costs	Operational, not coaching. Surfaces as a systems-integration ticket back to ops — the kind of structured signal Zeno leadership has no current way to receive from the floor.
Coaching response	Not a coaching issue — routed to ops as a structured integration request with frequency, store, and shift context.

AT SCALE

What the pilot turns this discovery into

The audio in this report came from one founder, four days, six stores. The pilot deploys a counter-side device across 20 Zeno stores for 90 days. The math, conservative against what we saw:

20 stores x ~10 hrs / day x 90 days	~18,000 store-hours of audio
Audible counter conversations / hour (observed median)	~24
Coaching-addressable events / 100 conversations (observed)	~6
Conservative pilot-window event yield	6,000+ classified events
Per-store report cadence	Weekly
Mid-pilot leadership review	Day 45

What changes after Day 45

Each classified event becomes either a coaching trigger attributable to a specific store, shift, and rep, or a structured ops ticket back to Zeno headquarters. The COO and CPO will, for the first time, see the floor as a measurable system: where customers bounce, why staff lose them, what to fix, and what to coach.

Path beyond the pilot

The pilot is structured as a 90-day product deployment, not a consulting engagement. If transcript quality, fleet reliability, and operational fit clear the bar at Day 90, the path forward is a monthly per-counter subscription across the 180-store fleet — same product shape, better unit economics at higher counter counts.

ABOUT

Ostronaut

Ostronaut builds operational intelligence for the physical retail floor. Our engine has run in production for the last 10 months at India's largest cardiac care network, where medical-grade fidelity is non-negotiable. We are deploying that same engine — paired with a custom counter-side audio device — across Zeno Health's pharmacy fleet starting April 2026.

Founders: Talvinder Singh & Meera Khokhani. YC alumni (W21, Pragmatic Leaders).

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This report was produced by the Ostronaut engine on a corpus of founder-captured pre-pilot audio. The same pipeline runs on the fleet-deployed device output. — Generated May 04, 2026.