

LYRA HOSPITALITY OS

Global Market Research | Cross-Platform Feature Intelligence | Independent
Hospitality Platform Proposal

CLIENT RESEARCH REPORT | 28 OCTOBER 2026

Source-faithful English edition of the previously prepared Russian-language client report.

Executive brief | Decisions in five minutes

Central proposition: build a modular Guest & Revenue Operating System, not a literal SevenRooms copy. Combine reservations, real-time dining-room operations, CRM, communications, payments, AI and analytics, with Dubai as the initial validation market.

Market context: Grand View Research estimates the broad global restaurant management software market at approximately USD 7.6 billion in 2026 and forecasts USD 24.1 billion by 2033 [S01].

Reservation software is a narrower segment. These figures are not our SAM or SOM and do not prove demand for our solution.

Proposal: pilot conflict-free bookings, floor plan, waitlist, guest CRM, confirmations and analytics at one venue. Then consider AI phone handling, WhatsApp, deposits, personalisation and POS integration.

Multi-venue groups and beach clubs follow validation.

Differentiation: independently implement useful product principles observed across SevenRooms, Eat App, Tock, TableCheck, Toast, Zenchef, CoverManager, Slang AI and Hostie, without reusing proprietary code or interfaces.

Client decision: authorise interviews with 5–10 venues and identify one design partner; then approve requirements, measurable outcomes and an estimate.

1. Research scope and evidence tiers

Fourteen product families were compared: SevenRooms, Eat App, OpenTable, Resy, Tock, TableCheck, Toast Tables, Zenchef, CoverManager, ResDiary, Yelp Guest Manager, Slang AI, Hostie and TheFork.

The desk research reviewed public product and support materials. Capabilities may differ by market, contract and subscription tier.

Four buyer jobs emerge: fill tables, reduce no-show losses, increase repeat visits and lower operational workload. MENA-specific candidates include Arabic/English support, WhatsApp, multiple venues, beach clubs, prepayment, enterprise permissions and data residency.

Evidence categories: FACT/PUBLIC SOURCE means publicly documented and still requires product-demo verification; VENDOR CLAIM means supplier-reported metrics or benefits, not demonstrated ROI; PROPOSAL means our architecture, priority or feature idea requiring implementation and tests; UNKNOWN means unresolved prices, private APIs, contracts, SLAs or local permissions.

2. Market structure and competitive dynamics

Three distinct economic models compete: discovery marketplaces that monetise guest acquisition; SaaS systems for direct reservations and CRM; and POS ecosystems or specialised AI add-ons. Feature count alone is unlikely to decide the winner: distribution, onboarding quality and useful first-party data matter.

DoorDash acquired SevenRooms in June 2025 [S02]. This indicates strategic value in restaurant relationships and demand-channel connectivity, but does not validate the valuation of any future product.

Potential target niche: restaurants juggling multiple booking channels, staff-intensive seating, missed phone enquiries and underused guest histories. Hypothesis: one operational system plus AI can reduce costs and increase direct repeat bookings.

3. Buyer segments and proposed packages

- Independent restaurant: missed calls, no-shows, manual seating. Proposed: booking + waitlist + CRM + AI inbox.
- Fine dining: deposits, VIP service and tasting events. Proposed: prepayment, guest intelligence and experiences.
- Restaurant groups: fragmented guest databases and overflow demand. Proposed: multi-venue operations, central CRM and cross-selling.
- Beach club/rooftop: zoned inventory, loungers and minimum spend. Proposed: zone maps, deposits and time blocks.
- Hotel food and beverage: concierge handoff, guest preferences and multiple demand sources. Proposed: controlled guest permissions and PMS integration.
- Nightlife/events: ticketing, capacity, groups and deposits. Proposed: tickets, guest list, capacity and payment handling.

4. Cross-platform product intelligence

- SevenRooms [S03]: CRM, reservations, marketing and Voice AI. Transferable idea: longitudinal guest identity and automated lifecycle journeys.
- Eat App [S04]: WhatsApp, 3D floor plan, POS, reviews and analytics. Idea: streamlined operations and relevant regional channels.
- OpenTable [S05]: discovery network and guest profiles. Idea: demand acquisition and distribution.
- Tock [S06]: prepaid experiences, tickets and add-ons. Idea: monetise more than table occupancy.
- TableCheck [S07]: multilingual service (vendor states 23 languages), multi-channel sync and live waitlist. Idea: multilingual concierge and channel reconciliation.
- Toast Tables [S08]: POS-linked meal progress, server rotation and covers. Idea: visibility into real service execution.
- Zenchef [S09]: direct commission-free bookings and CRM. Idea: simple economics and first-party guest relationships.
- CoverManager [S10]: zones, minimum spend and beach-club use cases. Idea: a vertical inventory engine.
- Slang AI [S11]: vendor claims 97 languages, VIP routing and sister-venue suggestions. Idea: AI-enabled sales and guest routing.
- Hostie [S12]: shared phone/message intake. Idea: omnichannel guest inbox.

This is feature discovery, not proof of functional equivalence and not permission to reuse third-party APIs or interface designs.

5. Feature priorities and implementation complexity

- MVP/P0: bookings with transaction-level locking. Core reliability; technically critical.
- MVP/P0: floor plan, table combinations and seating pace. Operational visibility; medium-to-high complexity.
- MVP/P0: guest CRM and consent ledger. Retention potential; privacy must be foundational.
- MVP/P0: waitlist and reminders. Rapid operational value.
- Phase 2/P1: AI voice and WhatsApp inbox. Capture missed enquiries; channel dependencies.
- Phase 2/P1: deposits, prepayments and experiences. Limit no-show exposure and create new revenue.
- Phase 2/P1: POS-linked actual spending attribution. Better guest personalisation.
- Phase 3/P2: group cross-selling and loyalty. Higher multi-site retention.
- Vertical/P2: beach-club zoning and minimum spend. Potential differentiation in Dubai premium hospitality.
- Experiment: dynamic pricing and demand forecasting. Only after sufficient reliable historical data.

6. Opportunity scenarios beyond the market baseline

6.1 AI Host: caller → reservation → CRM → confirmation. Detect language and intent; query real-time backend availability; present options; seek deposit consent where required; issue hosted secure payment link; record CRM activity; escalate ambiguous cases. No confirmation without successful transactional commit.

6.2 VIP continuity: one controlled profile of verified preferences and visits; restrict sensitive notes; assist with table preparation and contact-channel choice. Recommendations should show provenance and allow correction.

6.3 Demand recovery: if no table is available, offer waitlist, alternate time, a nearby group venue or a paid experience. Cross-venue sharing needs explicit policies and channel permissions.

6.4 Revenue orchestration: fine dining deposits, prix-fixe menus, ticketed evenings and upsells; beach clubs with zoned cabanas/loungers, minimum spend, booking windows, packages and capacity limits.

6.5 Restaurant Copilot: management can ask why Wednesday occupancy fell, which guests have not returned, or which channels produce no-shows. Ground answers in verifiable queries, denominators, date ranges and assumptions.

7. Proposed product architecture

This is our proposed architecture, not a description of SevenRooms internals.

Multi-tenant web/PWA and host tablet UI; modular API; PostgreSQL booking transactions; immutable reservation events; provenance-rich guest CRM and consent; outbox/event workers; adapters; analytics and an AI tool gateway.

- Experience: branded guest booking widget, host console and manager dashboard; fast, accessible workflows.
- Booking core: availability, assignments and waitlist state machine; idempotent reservations, zero double bookings.

- Guest and CRM: identities, preferences, visits, tags and consent; role-based access, export and deletion.
- Revenue: payment links, deposits and experiences; PSP-hosted checkout and verified webhooks.
- Channels: WhatsApp, voice, email, social and POS using official authorised integrations only.
- AI: structured booking tools, FAQ retrieval, handoff; no fabricated availability, complete audit trail.
- Data and operations: metrics, backups, monitoring, restoration exercises and tenant isolation.

8. Booking engine quality and state model

Entities: tenant, venue, dining_area, table, table_combination, service_period, availability_rule, booking, booking_assignment, guest, consent, waitlist_entry, experience, payment_intent, communication and audit_event.

States: requested → held → confirmed → checked_in → seated → completed, with cancelled, expired and no_show alternatives. Transitions must be explicitly validated.

Availability must account for visit duration, party size, table merges, seating pace, zone restrictions, temporary holds and approved third-party inventory.

Confirmation requires an atomic transaction and appropriate database constraints/locking. Idempotent retries protect against duplicate requests. Payment webhooks can be duplicated or out of sequence; reconcile them independently. Guest-profile permissions, deletion and export are core requirements.

9. Integrations and MCP: build, buy or partner

- Google Reserve/social booking: investigate official partner channels; inventory publication rights cannot be assumed.
- WhatsApp Business Platform: approved BSP or direct official API; templates, opt-in and provider terms apply.
- Voice AI: telephony/ElevenLabs adapter linked to verified booking tools; check local number, recording and consent rules.
- POS: build the first adapter for the actual pilot venue's system; requires authorised access and guest/order mapping.
- Payments: licensed PSP with hosted card capture; never hold raw card details in our database.
- SevenRooms API: only with granted partner access; private documentation and a public official MCP remain unverified [S13].
- Our platform's MCP: first-party tool server with scoped credentials, RBAC and action-confirmation gates.

10. AI safety, privacy and regulatory review

Require legal review for UAE PDPL and relevant emirate/free-zone rules, marketing consent, call recording, WhatsApp Business terms, PSP licensing, retention and international transfers. Generic claims of GDPR compliance are not enough.

Engineering safeguards: tenant isolation; least privilege; guest consent; encryption; secrets vault; deletion and retention workflows; security logs; payment-data separation; rate limits; abuse controls; backup and verified restore.

AI agents should not independently initiate payments, mass messaging or transfer protected data without authorisation and auditable actions.

11. Roadmap, gates and what not to build first

0 — Discovery: 5–10 interviews, two staff-shadowing sessions, actual SaaS quotes and the venue POS stack. Gate: a material pain point and an accessible pilot.

1 — Prototype: floor-plan UX, guest reservation flow and clickable demo. Gate: hosts complete realistic scenarios unaided.

2 — MVP: availability, booking, waitlist, CRM, roles and reporting. Gate: concurrency tests and reliable pilot transactions.

3 — AI and revenue: voice, WhatsApp, deposits, guest messaging and POS. Gate: measured enquiry outcomes and no-show performance.

4 — Multi-venue: cross-selling, enterprise permissions and analytics. Gate: stable operation across sites.

5 — Commercial pilot: onboarding, SLA, billing, monitoring and support. Gate: repeatable rollout and real willingness to pay.

Avoid building a public marketplace before distribution exists; dozens of POS/channel adapters before selecting a pilot; promising AI optimisation without controlled data; or copying protected software, visual assets, private schemas or client databases.

12. Economics and return-on-investment testing

Define booking counts by source, inquiry-to-seated conversion, no-show rate, service-window occupancy, time to seat, enquiry handling labour, direct booking share, repeat visits, retained deposits and guest lifetime contribution. Every KPI needs an exact numerator, denominator, date window and source.

Illustrative scenario equation (not a forecast): incremental contribution = additional guests × per-guest contribution + avoided no-show losses + genuinely saved staff labour – messaging, PSP, support and subscription costs.

Test inputs in a controlled pilot before committing to pricing or ROI claims. Potential revenue models: base subscription per venue, AI-minute usage, multi-location tiers, premium revenue modules, setup and migration fees. Compare total cost including PSP fees, messaging volumes and service overhead.

13. Risk register

- No demonstrated market/migration willingness → product spend without sales → customer interviews and paid-pilot gate.

- Double booking → broken service and trust → transactional allocation plus contention testing.
- Platform access restriction → absent channel/POS capability → obtain authorised partner access before contractual promises.
- AI errors → inaccurate confirmations or disputed representations → structured tools, confirmation gates and staff escalation.
- Privacy/marketing failures → legal and reputation exposure → local legal review, consent, permissions and audit.
- Vendor dependency → reduced capability when APIs change → adapters and graceful fallback.

14. Cross-vertical expansion

A resource + time slot + package + capacity constraint can extend beyond restaurant tables, but each segment requires separate workflow and legal validation.

- Beach/pool/rooftop: reuse bookings, area map, CRM and payments; add zoned prices, minimum spend and weather-sensitive policies.
- Hotel concierge/F&B: reuse identity, communications and availability; add PMS integration, access controls and itineraries.
- Events/private dining: reuse reservations, tickets and deposits; add contracts, packages, menus and room capacity.
- Wellness/spa: reuse calendar, preferences and payments; add employee skills, treatment duration and buffers.
- Coworking/amenities: reuse slots, entitlements and access workflows; add memberships and door/access-control integrations.

15. Proposed competitive differentiation

- AI-native: phone, WhatsApp, front desk and manager copilot sharing one authoritative availability engine.
- Dubai/MENA-first: Arabic and English, multicultural service and WhatsApp workflows.
- Vertical-ready: booking inventory for restaurants, beach clubs, rooftops and curated experiences.
- Owner-first data: guest data export, transparent consents and reduced lock-in.
- Evidence-first analytics: conversion and operational metrics rather than unsupported forecasts.
- Integration-first: independent adapters for legally available systems.

16. Client engagement options

Option A — Discovery & Solution Blueprint: buyer interviews, business-process analysis, requirements matrix, relevant competitor demos, integration audit and initial engineering estimate. Safest initial commitment.

Option B — Design-partner MVP: reservations, waitlist, floor plan, CRM and notifications for one restaurant, conditional on approved architecture, privacy controls and budget.

Option C — AI Enhancement: voice/WhatsApp on top of an existing restaurant system, provided its authorised API permits it. Potentially faster than a complete replacement.

Option D — Platform Rollout: multi-tenant SaaS, venue groups, payments and industry-specific modules after demand and operating economics have been validated.

17. Follow-up research and acceptance criteria

- Obtain legitimate demos/trials of SevenRooms, Eat App, Tock, Toast Tables and TableCheck; record observable workflows lawfully.
- Compare real commercial proposals from three to five providers, including regional limitations.
- Interview Dubai restaurant owners, GMs, host staff, chefs and IT/POS managers separately.
- Draft PRD 1.0, ERD, event/state machine, UX wireframes and at least 30 edge-case tests.
- Run a controlled venue pilot and measure baseline-versus-pilot KPIs; advance only if results justify it.

Appendix | Open questions for the client

- Who will own the product and who is the first paying customer: restaurant, group, beach club or SaaS venture?
- Which POS, reservation and payment platforms are already in use and available through authorised integration?
- Is the goal an independent SevenRooms replacement or an AI enhancement layered on an existing tool?
- What are current booking/call volumes and the measured costs or losses?
- What are the requirements for personal-data residency, languages, payments, uptime and the budget envelope?

Source catalogue

- S01 — Grand View Research — restaurant management software:
<https://www.grandviewresearch.com/industry-analysis/restaurant-management-software-market>
- S02 — DoorDash acquisition: <https://about.doordash.com/en-us/news/doordash-completes-acquisition-of-sevenrooms>
- S03 — SevenRooms Voice AI: <https://sevenrooms.com/platform/VoiceAI/>
- S04 — Eat App feature guides: <https://restaurant.eatapp.co/knowledge/feature-guides>
- S05 — OpenTable restaurant solutions: <https://www.opentable.ae/restaurant-solutions/our-solutions/>
- S06 — Tock reservations: <https://www.exploretock.com/join/reservations/>
- S07 — TableCheck: <https://www.tablecheck.com/en/join/>
- S08 — Toast Tables: <https://pos.toasttab.com/products/toast-tables>
- S09 — Zenchef plans: <https://www.zenchef.com/plans>
- S10 — CoverManager: <https://www.covermanager.com/en/solution/reservations>
- S11 — Slang AI: <https://www.slang.ai/>
- S12 — Hostie: <https://hostie.ai/>
- S13 — SevenRooms API: <https://api-docs.sevenrooms.com/>
- S14 — SevenRooms pricing: <https://sevenrooms.com/pricing/>
- S15 — Eat App reservations: <https://restaurant.eatapp.co/restaurant-reservation-software>
- S16 — Tock prepaid experiences:
<https://tock.zendesk.com/hc/en-us/articles/18413122691220-Best-Practices-for-Prepaid-Experiences>
- S17 — Toast Waitlist guide: <https://support.toasttab.com/en/article/Getting-Started-Toast-Waitlist>
- S18 — SevenRooms integration: <https://sevenrooms.com/platform/integrations-apis/>
- S19 — DoorDash SEC filing: <https://www.sec.gov/Archives/edgar/data/1792789/000179278926000050/dash-20260630.htm>

Scope and legal note

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