

Palomarr partnership

MDF allocation request

Package - Gold package

Amount - \$5,000 quarterly

Executive summary

We request approval of \$5,000 in current quarter MDF funds for Palomarr's Gold Package to accelerate qualified opportunity generation. This partnership leverages Palomarr's proprietary LLM-based search engine and proven marketing strategies to identify and engage "real buyers with real budgets" 24/7. With an expected delivery of 12 - 20 qualified opportunities per quarter at approximately \$278 - \$417 per opportunity (65% below industry average), this investment offers exceptional ROI with minimal risk.

Clear deliverables and expectations

Committed marketing activities (per quarter)

1. Quarterly event (Palomarr-hosted)

- Expected attendance: 10 - 15 qualified prospects
- Featured as premier partner
- Dedicated speaking/demo opportunity
- Pre-event prospect list for outreach

2. Monthly marketing campaigns (3 total)

- Targeted campaigns to Palomarr's CCaaS buyer database
- A/B tested messaging focused on differentiators
- Real-time optimization based on engagement metrics
- Multi-touch nurture sequences

3. Competitive intelligence package

- Comprehensive SWOT analysis vs. competitors
- Quarterly scorecard tracking up to 10 competitors
- Market insights from buyer behavior data
- Win/loss analysis insights

4. CVxEXPO presence

- Standing tabletop in the Palomarr Pavilion
- Access to pre-qualified attendee list
- Co-marketing opportunities
- Executive meeting facilitation

ROI justification

- \$278 - \$417 cost per opportunity
- 36 - 72x ROI multiple
- \$180K - \$360K pipeline value

Expected outcomes

Based on historical performance

Activity	Expected result	Value
Quarterly event	10-15 qualified leads	3-5 meetings booked
Monthly campaigns	3-5 meetings per month	9-15 total meetings
Total quarterly	13-20 opportunities	\$180K-\$360K pipeline

Why Palomarr, why now

Unique differentiators

- Proprietary LLM-based search engine for CX buyers
- Top 1% performer among Telarus sub-agents for CCaaS
- Multiple performance awards including "Most CCaaS Opportunities Generated"
- Specialized focus exclusively on CX/CCaaS buyers

Performance accountability framework

Success metrics & KPIs

Metric	Quarter target	Minimum threshold
Qualified opportunities	15	10
Cost per opportunity	< \$350	< \$500
Meeting show rate	80%	70%
Opp-to-close rate	25%	15%
Pipeline value generated	\$225k	\$150k
Time to first meeting	< 7 days	< 14 days

Quarterly gate review

End of quarter

- Continue Gold: 12+ qualified opportunities generated
- Upgrade to Platinum: 18+ opportunities with strong conversion
- Pause/Adjust: <10 opportunities, reassess approach
- Exit: <5 opportunities with no improvement trend

Risk mitigation

No annual lock-in

Quarterly commitment only with clear exit criteria

Flexible scaling

Can adjust tier up/down based on results

Partner flexibility

Palomarr committed to customization if needed

Governance and reporting

- Weekly - Automated lead flow reports
- Monthly - Campaign performance dashboard, meeting recordings, pipeline report
- Quarterly - Executive business review with CEO, SWOT presentation, go/no-go decision