EXECUTIVE PRESENTATION · DELIVERABLE A

MarketPulse

A multi-market expansion & monetization strategy for Ai Palette

Market-entry sequencing · pricing & packaging · the standardization ↔ localization trade-off

Figures are illustrative, benchmark-anchored estimates — Ai Palette is private (no public financials).

EXECUTIVE SUMMARY

Standardize the engine, localize the edge, price to willingness-to-pay

Expansion fails when it over-localizes (engineering bloat) or under-localizes (lost deals). MarketPulse makes localization, packaging, pricing and go-to-market one connected, repeatable system.

PRODUCTIZE THE SCALE

~80% of the platform is global; localize only the ~20% edge as configurable Market Packs. Package into 3 maturity tiers.

MONETIZE TO WTP

Hybrid pricing (subscription + usage + seats) with regional price multipliers 0.45–1.00×. Price localization, not product localization.

SEQUENCE & PROVE

Deepen SEA+India → attack US → broaden to EU/Japan. Validated by a weighted score, SHAP explainability, and an MDP optimal policy.

~$28M
Year-5 ARR (base case)

110%+
Target net revenue retention

~80%
Code shared across markets

3 waves
Sequenced market entry

THE EXPANSION BLIND SPOT

Naïve expansion punishes you twice — and the clock is ticking

1. **Markets are heterogeneous**

   Consumer behavior, categories, language, channels, pricing tolerance, compliance and support all differ region to region.

2. **Both naïve responses fail**

   Localize everything → engineering bloat & fragile releases. Localize nothing → weak local insight & lost enterprise deals.

3. **Complexity outruns revenue**

   Without a framework, operational cost rises faster than revenue as you add markets.

WHY NOW

The category just consolidated.

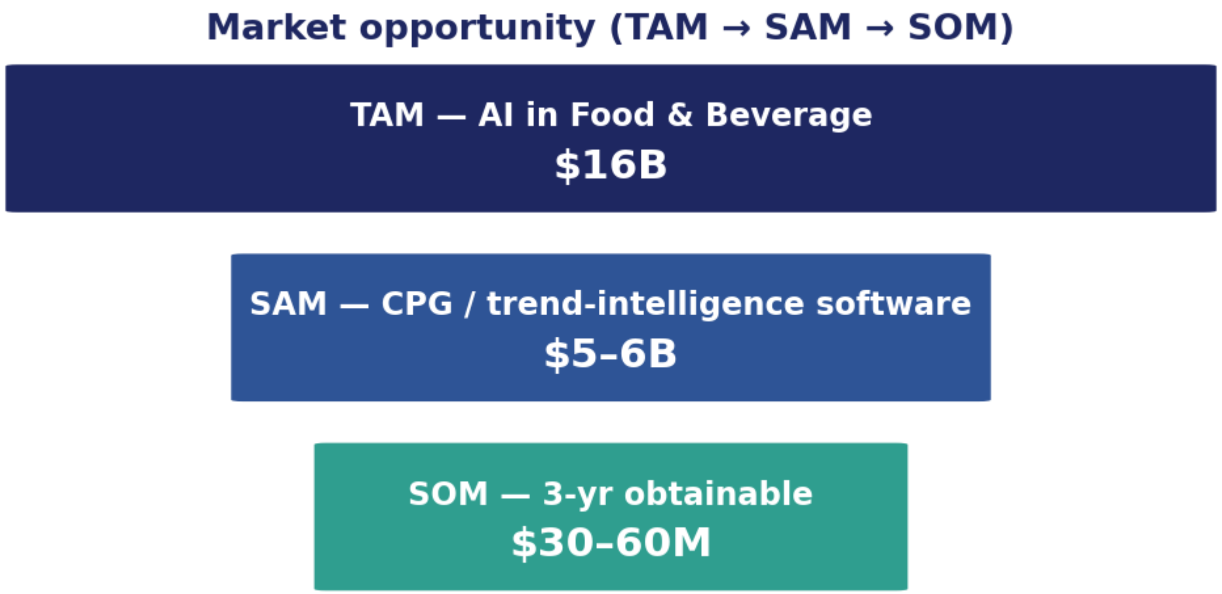
Mintel acquired Black Swan Data (Jun-2025), folding the strongest pure-play predictor into a slow incumbent — vacating the nimble, end-to-end, multi-market position Ai Palette can own.

The window is open but closing.

Source: Mintel press release, Jun-2025

MARKET OPPORTUNITY

A focused slice of a large, double-digit-growth market



WHAT THE NUMBERS SAY

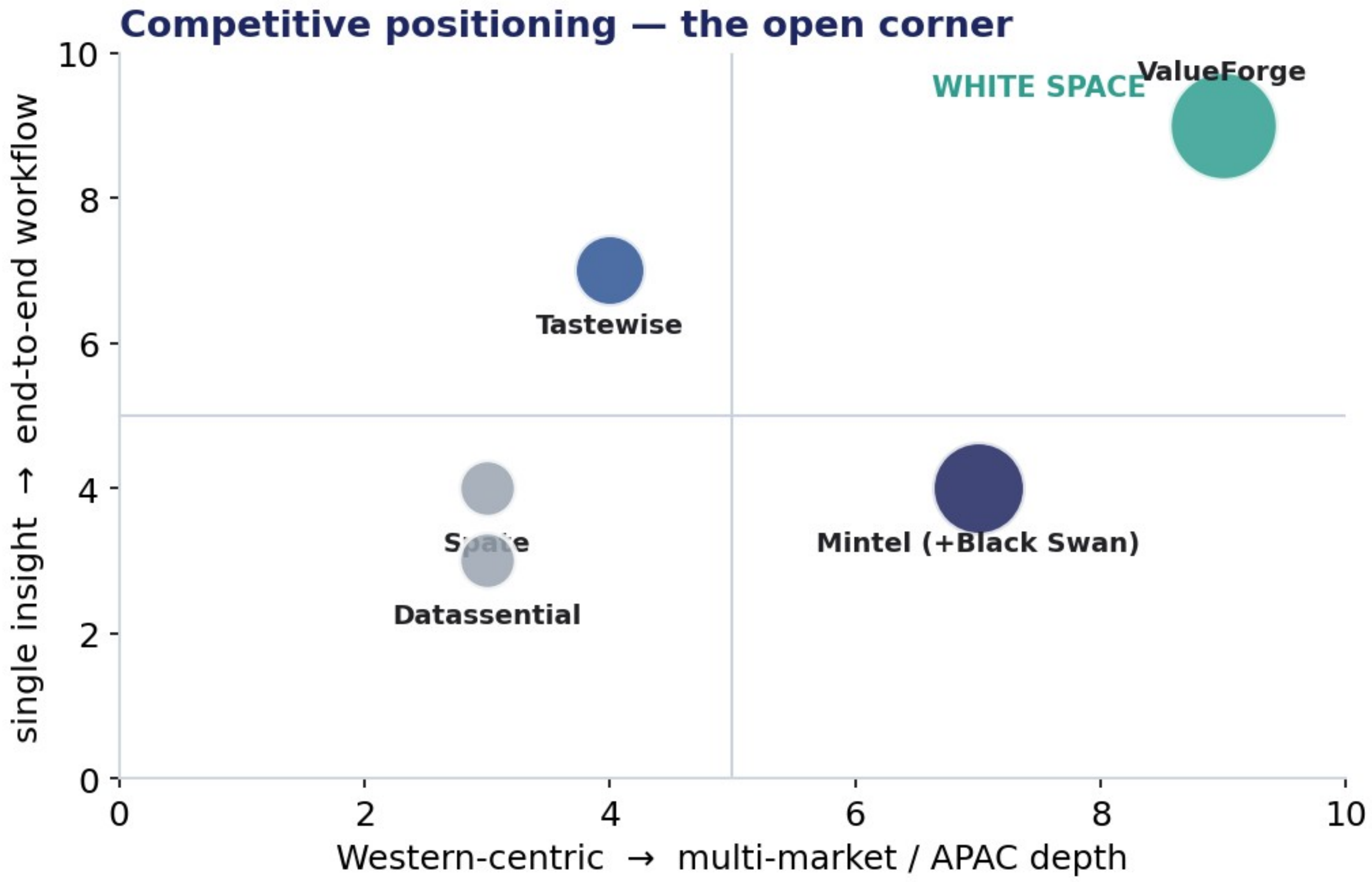
$16B TAM — AI in Food & Beverage (2025), ~39% CAGR

$5–6B SAM — CPG / trend-intelligence software, ~10% CAGR

$30–60M SOM — 3-yr obtainable across Wave 1–2 markets

Large enough to support a tiered multi-market model; small enough that focus & sequencing matter.

Post-consolidation, the end-to-end + APAC corner is open



THE WHITE SPACE

- **End-to-end workflow**

  Ai Palette runs signal→concept→screen; incumbents stop at insight.

- **Multi-market / APAC depth**

  18 languages, 24 countries — built in, not bolted on.

- **Explainable & generative**

  Concept Genie + SHAP-style scoring vs. static reports.

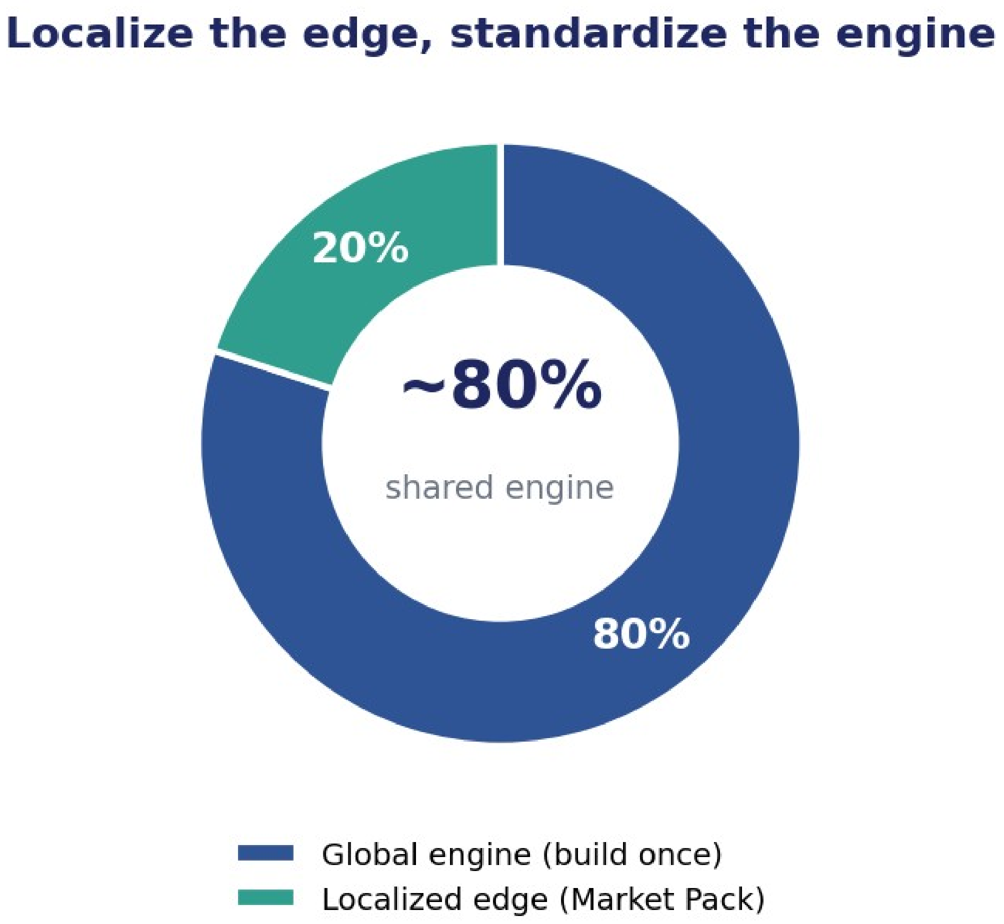
- **Consolidation tailwind**

  Black Swan absorbed into Mintel — the nimble seat is empty.

Source: company sites, CB Insights, Mintel (Jun-2025)

PHASE 1A · THE CORE TRADE-OFF

Localize the edge, standardize the engine — ship Market Packs, not code forks



WHAT STAYS GLOBAL vs. LOCALIZED

GLOBAL — build once

ML & forecasting core · generative model · data-ingestion framework

LOCALIZE — the edge

Local data sources · language/NLP · category taxonomy · compliance/residency · enterprise workflow

DEFER

Full UI translation — English-first is acceptable in B2B

The bloat firewall: a Market Pack = {language · data connectors · taxonomy · brand set · compliance · currency · support}. Adding a market = a config, not a branch.

Three tiers mapped to enterprise maturity — one product, gated by entitlements

ESSENTIALS
Exploratory

1 market · ~3 categories
Trend discovery, dashboards
Self-serve · PLG-assisted

< $10K ACV

GROWTH
Operationalizing

Several markets/categories
+ Concept Genie + Screen Winner
Priority support · hybrid motion

$25–60K ACV

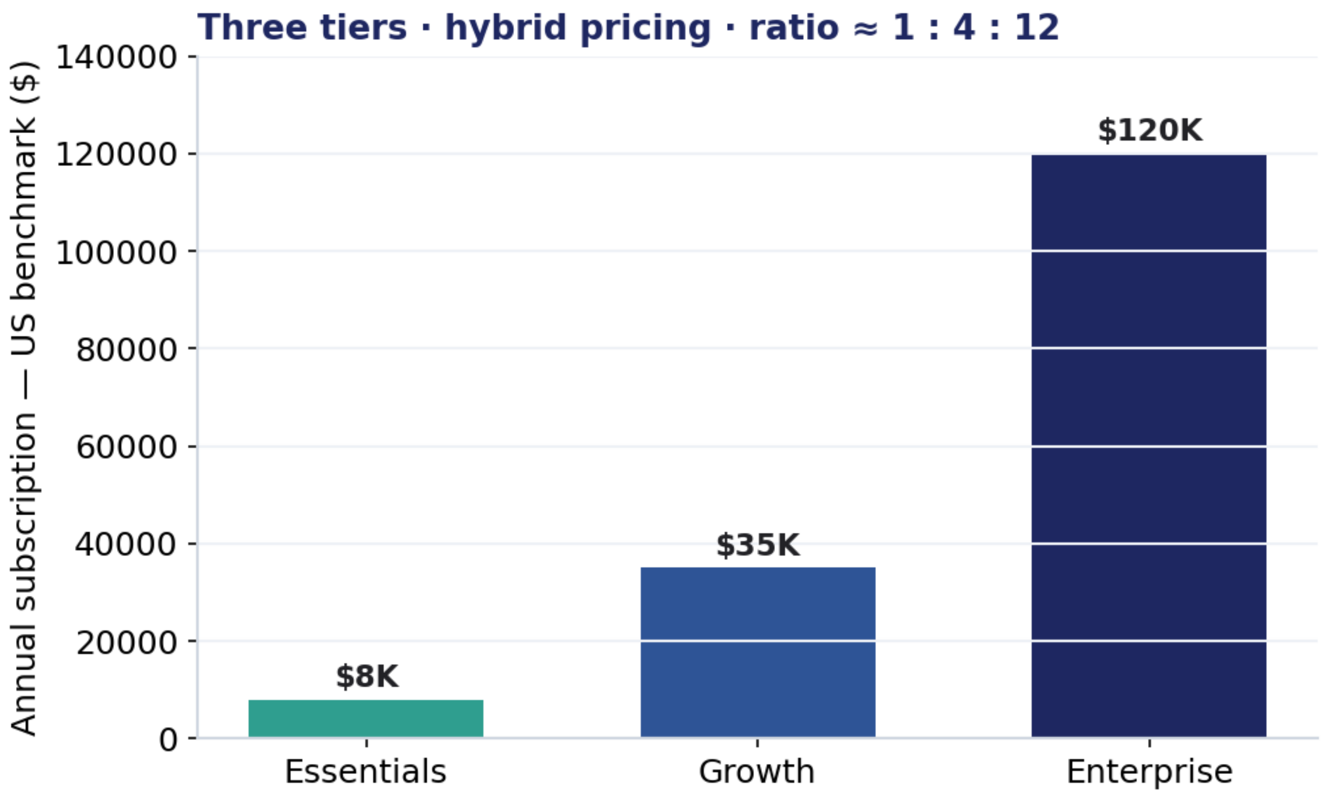
ENTERPRISE
Industrialized

All markets · integrations
residency · governance · CSM
Sales-led

$80K+ ACV

Four upsell levers — markets · categories · usage · seats — drive land-and-expand toward 110%+ NRR.

A hybrid model — subscription anchor + usage value-metric + seats



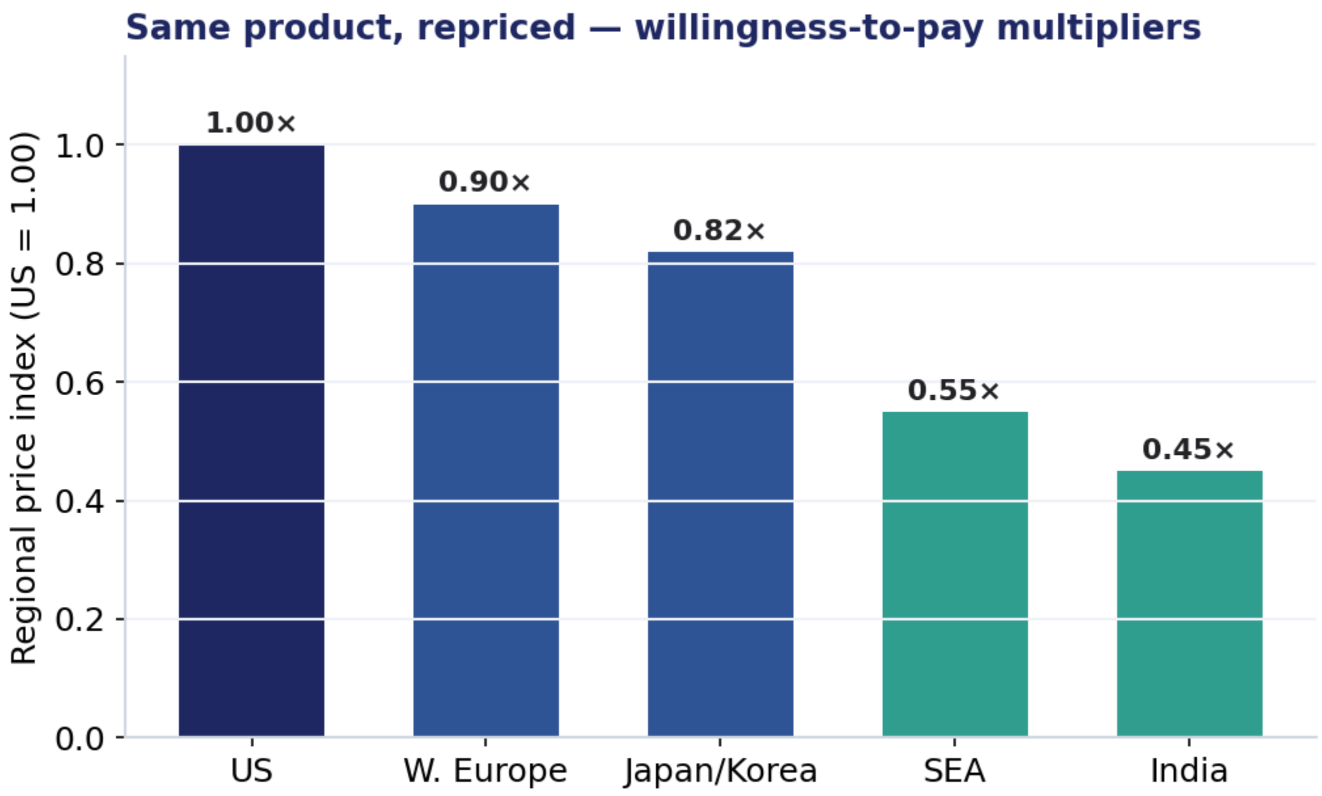
WHY HYBRID

- **Subscription**
  revenue anchor & budget predictability
- **Usage / credits**
  value metric = markets × categories × Concept Genie runs; powers NRR
- **Seats**
  secondary expansion lever, not the primary meter

2025 benchmarks: pure per-seat is declining (57% ↓); usage is mainstream (61%); hybrid posts the highest growth (~21%).

Sources: Monetizely, Maxio 2025 SaaS pricing studies

Same product, repriced — price localization, not product localization



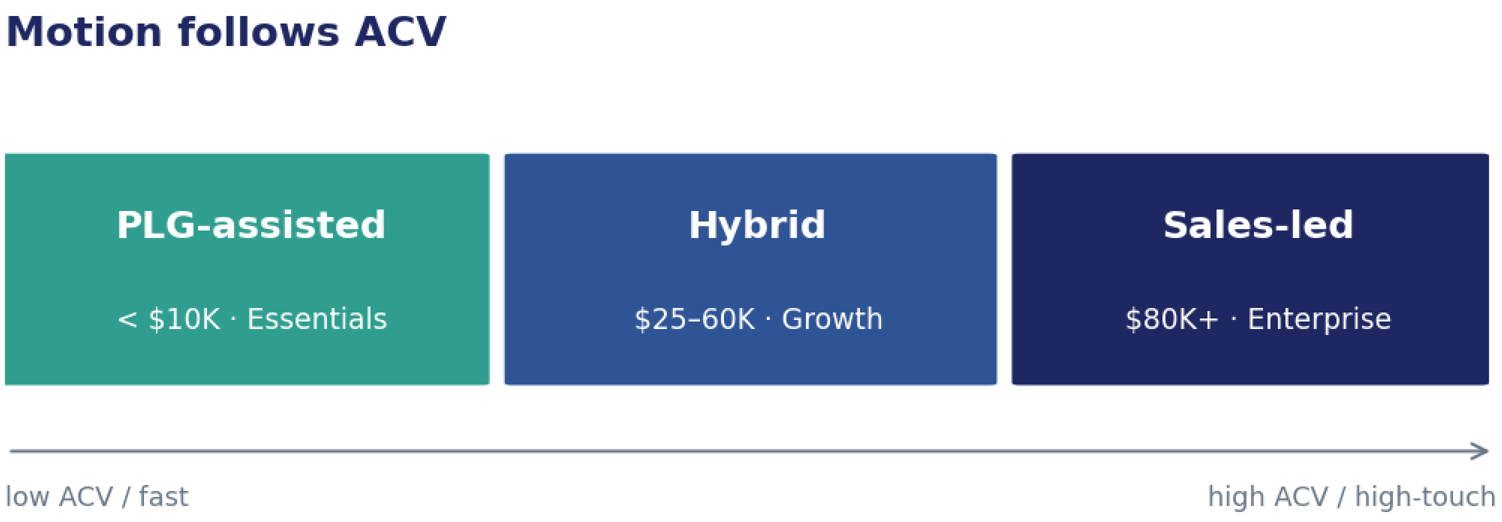
HOW IT WORKS

We never change the product per region. We apply a price multiplier and shift the tier mix we lead with — protecting margin in high-WTP markets and adoption in price-sensitive ones, on one codebase.

WTP ORDER

US > W. Europe > Japan/Korea > SEA > India.
Lead Enterprise in the West; lead Growth + Essentials in SEA/India to widen the funnel.

Motion follows ACV — spend human service only where it pays for itself



PLG-assisted < $10K · Hybrid $25–60K · Sales-led > $80K — the benchmark thresholds for PLG vs. sales-led.

OVERHEAD CONTROL

- **Self-serve flywheel**

  a free sample trend report becomes the Essentials funnel — low CAC.

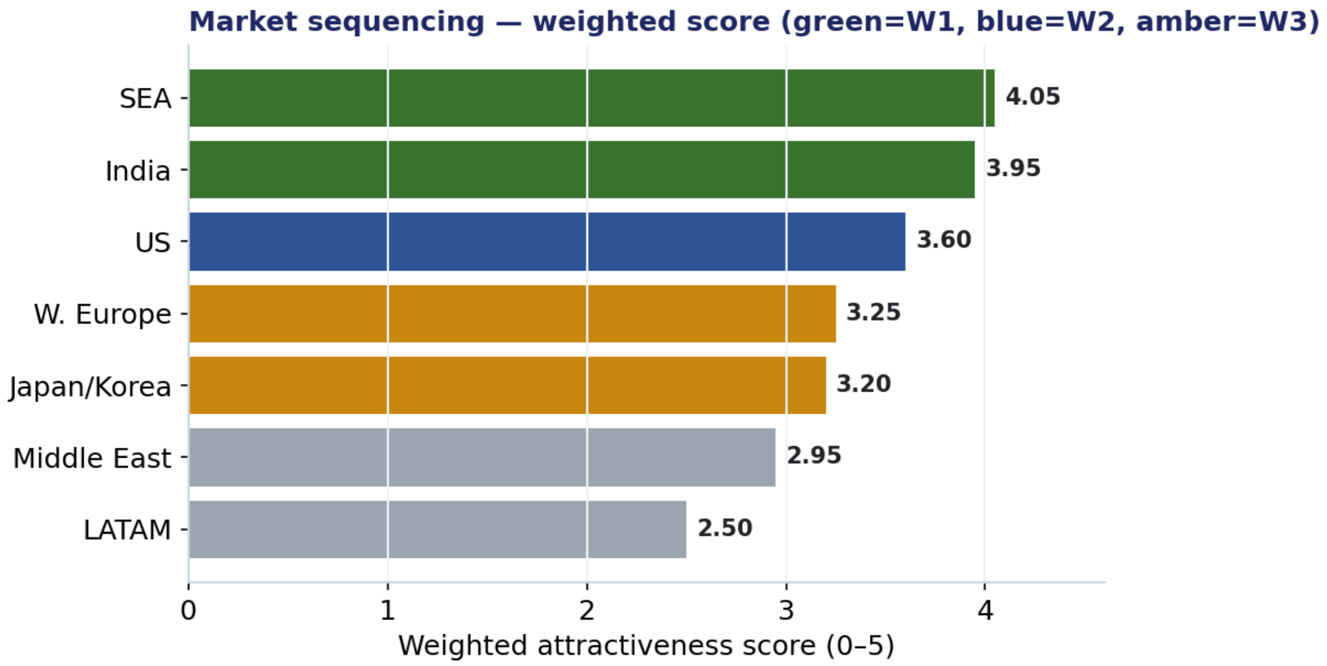
- **Channel partners**

  absorb local sales/support in Japan/Korea & MEA — enter without a full local team.

- **Tiered service**

  docs+chatbot at the bottom; named CSM + SLA only at Enterprise.

Scored, not guessed — a weighted rubric ranks where to go and when



WAVE 1 · 0–9 mo

Deepen SEA + India

Cheapest, highest data-readiness; build references.

WAVE 2 · 6–18 mo

Attack the US

Highest WTP + global-HQ pull-through; fund field sales.

WAVE 3 · 18–30 mo

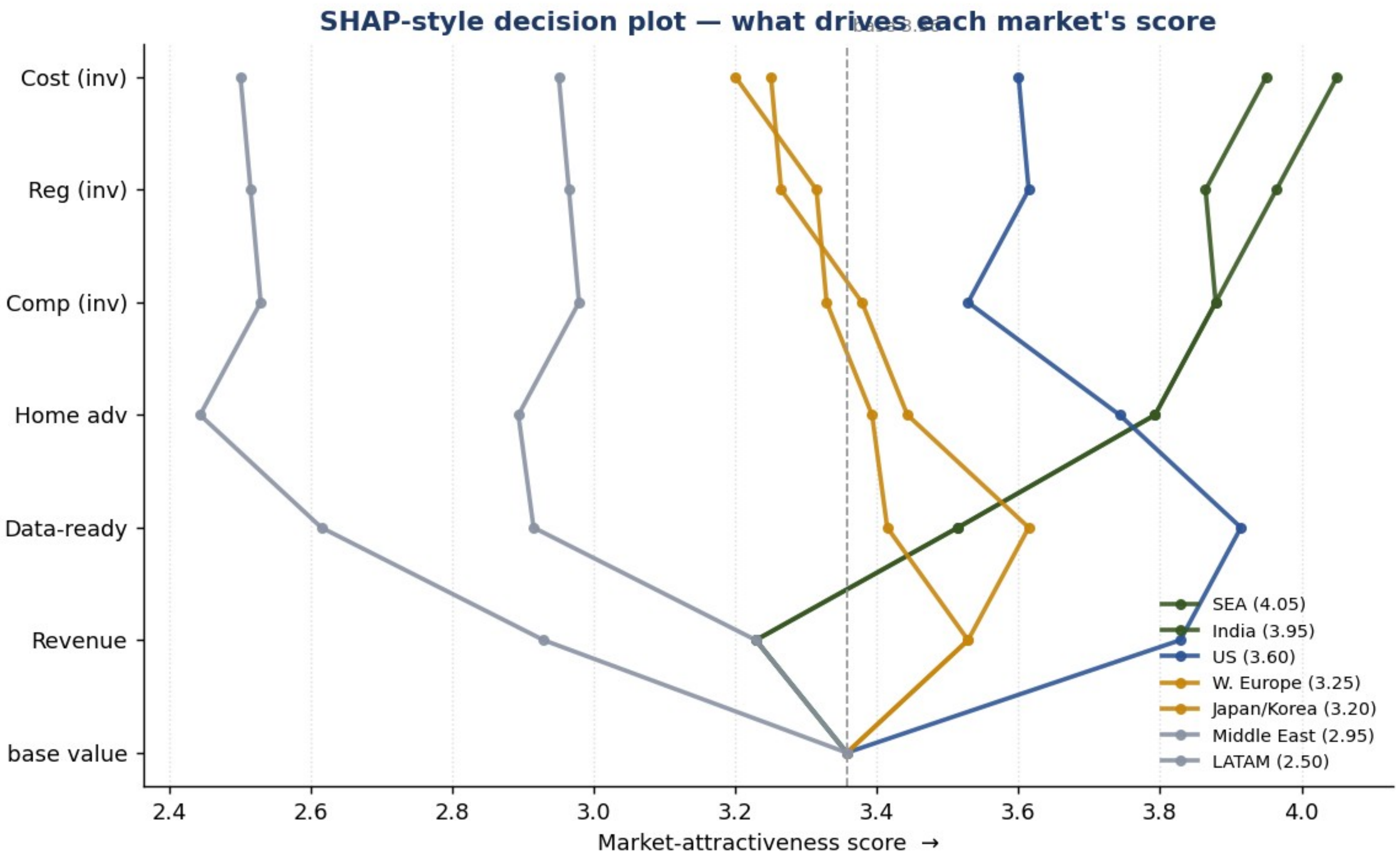
W. Europe + Japan/Korea

Reuse US compliance; partner-led in Japan.

Rubric: revenue 30% · data 20% · home 15% · comp 15% · reg 10% · cost 10% — see docs/07

WHY THE RANKING HOLDS — EXPLAINABLE SCORING (SHAP)

Each market's score, decomposed into its drivers



THE READ

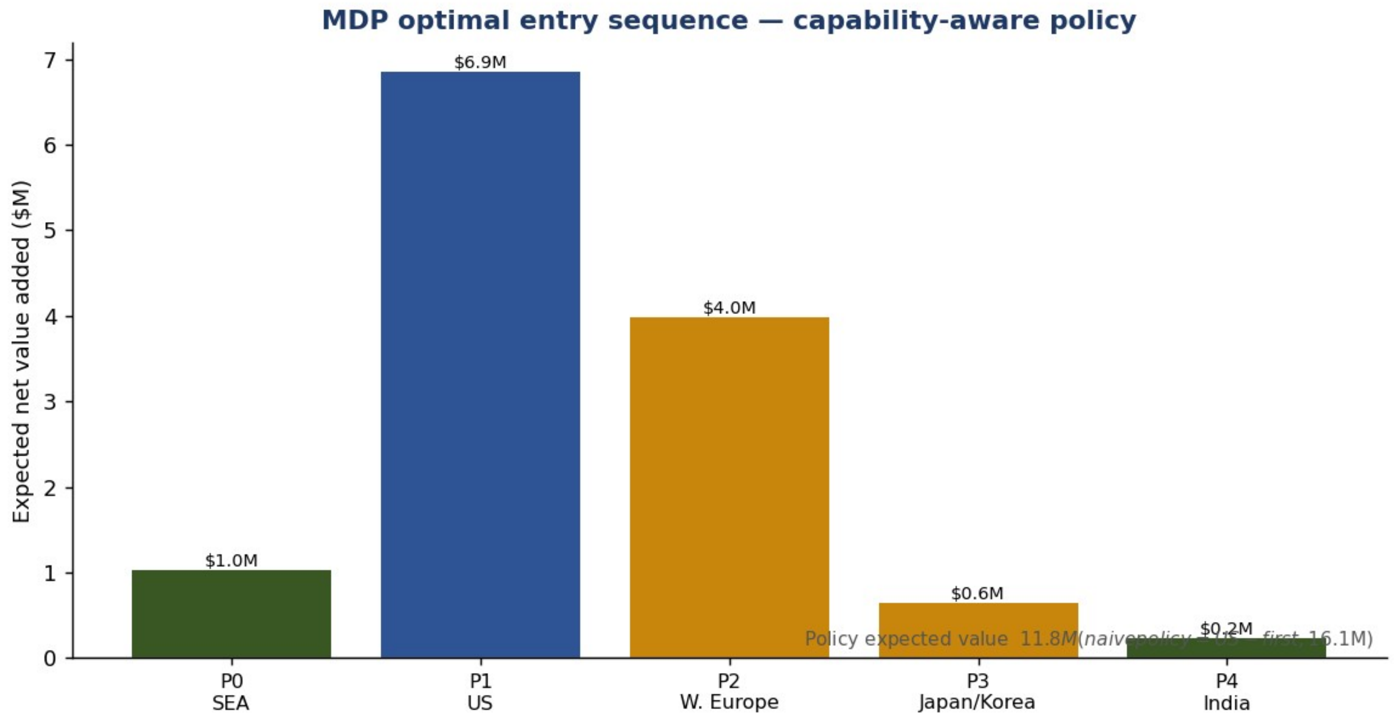
The score is an additive model, so Shapley values are exact and closed-form.

US earns the top Revenue contribution — but is dragged down by weak Home-advantage and high Competition.

SEA & India climb on Data-readiness + Home-advantage, which is why they out-rank the US on the blended score.

SEQUENCING IS THE OPTIMAL POLICY OF AN MDP

Risk-adjusted optimization validates Wave-1-then-US



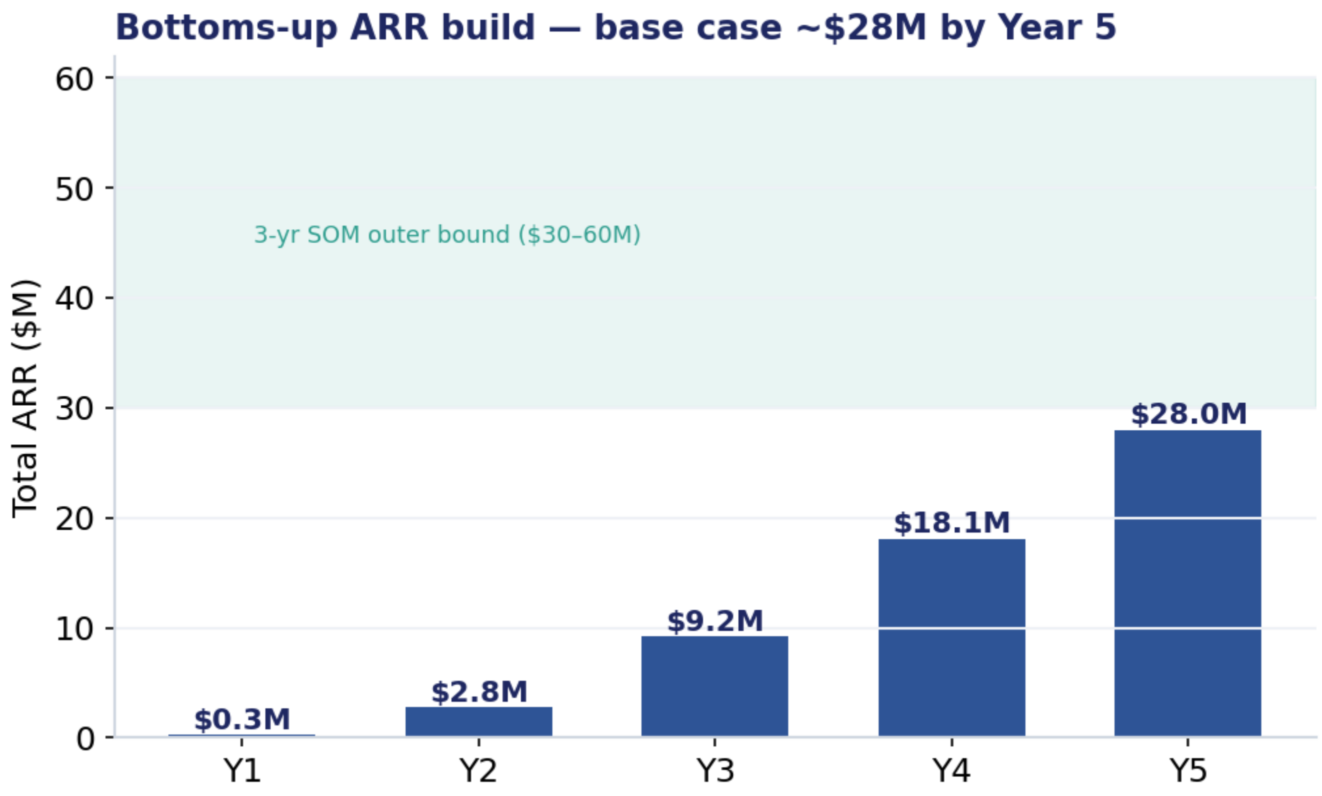
THE INSIGHT

Modeled as states (markets entered), actions (which to enter), uncertain success, and reuse synergies.

Naïve / risk-neutral → US-first.

Price in cold-start risk (no references, unproven motion) and the optimum flips to SEA → US → EU/Japan — exactly our recommended sequence.

A conservative ramp compounds to ~$28M ARR by Year 5



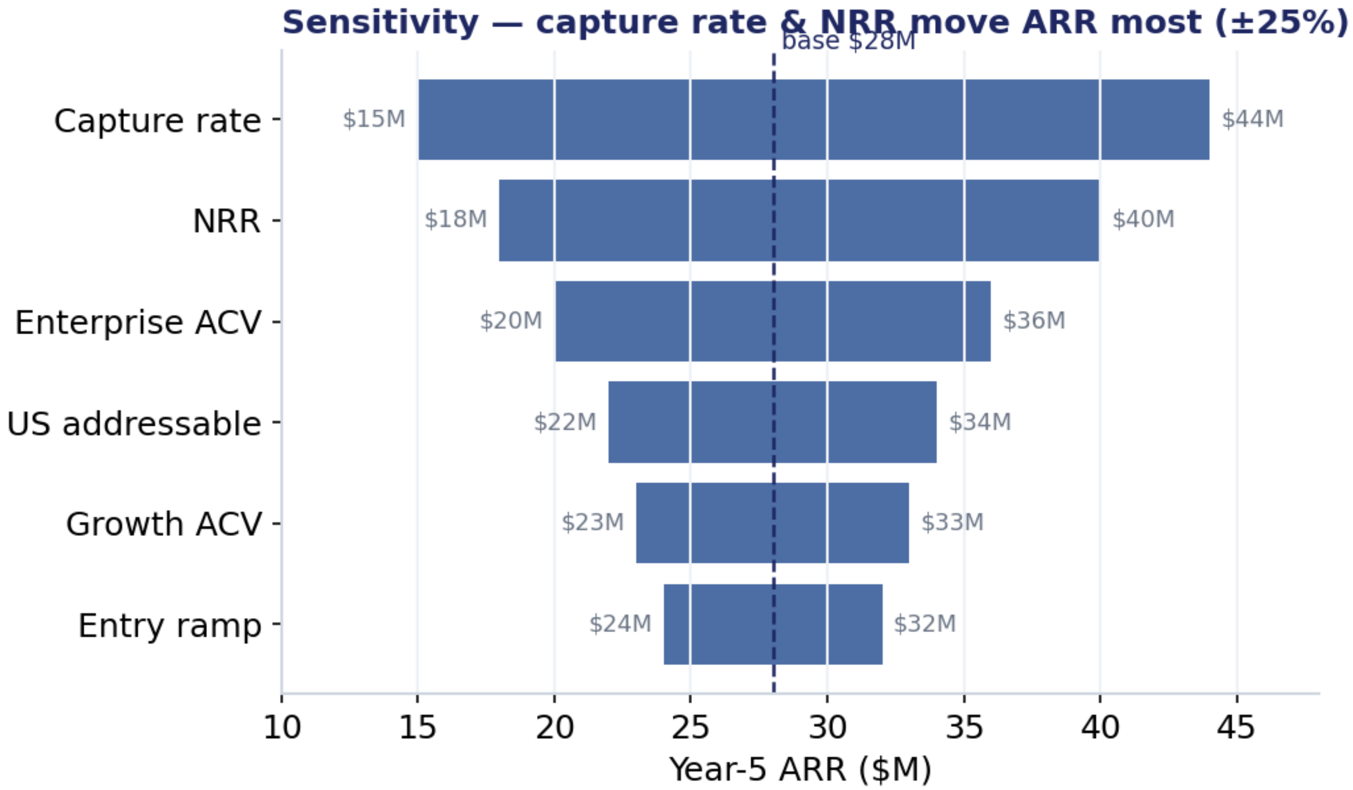
~$9.2M
Year-3 total ARR (base case)

~$28M
Year-5 total ARR (base case)

110%+
Net revenue retention

Method: accounts × capture × blended ACV, compounded by NRR. Sits below the SOM outer bound — a realistic ramp, not a ceiling.

Capture rate and retention are the biggest levers



SO WHAT

- **Capture rate**

  GTM efficiency is the #1 driver → front-load cheap references (Wave 1).

- **NRR**

  Retention compounds hardest late → invest in the 4 upsell levers.

- **ACV mix**

  Enterprise ACV matters → why US (Wave 2) carries the model.

Tiers × markets × localization × monetization, in one map

Market	Wave	Lead tier	Localization depth	Price idx	Lead ACV*	Motion
SEA	1	Growth	Standard pack + taxonomy	0.55	**~$19K**	Hybrid
India	1	Essentials/Growth	Standard · volume	0.45	**~$16K**	PLG-assisted
US	2	Enterprise	Full + residency + integrations	1.00	**~$120K**	Sales-led
W. Europe	3	Enterprise	Full + GDPR (reuse US)	0.90	**~$108K**	Sales-led
Japan/Korea	3	Enterprise	Full via partner	0.82	**~$98K**	Partner-led
Middle East	Later	Growth	Standard · inbound/partner	0.70	**~$25K**	Partner/inbound
LATAM	Later	Essentials/Growth	Minimal→standard	0.50	**~$18K**	PLG-assisted

*Lead ACV = US tier benchmark × regional price index. Full live model in DeliverableB_Commercial_Architecture.xlsx.

ROADMAP & THESIS

Growth that compounds, not fragments

- **Q1–Q2** Market-Pack architecture · Essentials self-serve · usage metering
- **Q2–Q3** Hybrid price book + regional multipliers · decision engine live
- **Q3–Q4** US Enterprise motion: integrations, residency, security · anchor logos
- **Year 2** W. Europe (reuse compliance) + Japan/Korea (partners) · Market Launchpad

Standardize the engine, localize the edge, package by maturity, price by willingness-to-pay, and let motion follow ACV — one repeatable, explainable engine so expansion compounds instead of fragmenting.