

## Business Case — One Pipeline, Shared Ownership

### Thesis

Sales and Marketing must **co-own one pipeline number**. The Agentic MDF Optimizer makes this practical: it turns last month's evidence into next month's **budgeted bets**—and explains them so both teams sign the same plan.

### Why this works

- **Single source of truth:** one forecast line = Baseline + MDF uplift (landing after a learned 2–3-month delay).
- **Joint accountability:** Marketing commits the MDF plan; Sales commits conversion assumptions; both own the resulting pipeline.
- **No black box:** the LLM writes the rationale in plain English; leaders see the *why*, not just the math.

### What it does (architecture, zero fluff)

1. **Lag Learner** — finds the delay from spend to impact (usually 2–3 months).
2. **ROI Learner (by campaign)** — estimates stable  $\$ \rightarrow \$$  from history (shrinkage keeps it safe on small data).
3. **Campaign Allocator** — explores a little, exploits a lot; proposes MDF by campaign type to maximize uplift.
4. **Partner Fairness Allocator** — splits the pot equally across the **top-K partners** by historical ROI (K=2 default), respecting caps to avoid over-concentration.
5. **Guardrails** — enforces caps, budget sum, and flags anomalies.
6. **Reviewer (LLM)** — produces a board-ready narrative + “scale/stop” notes.

### How it creates shared responsibility

- **Inputs Marketing owns:** MDF budget, campaign mix, partner caps, exploration % (learning appetite).
- **Inputs Sales owns:** conversion assumptions and baseline trajectory (the “without new MDF” line).
- **Joint output:** one PDF and CSV that tie **named MDF allocations** to **dated pipeline impact**. If we move \$10k, both teams see the new impact month and uplift immediately.

### What leaders see each month

- **Tables:**
  - **Campaign type** | Probability | MDF allocation | Pipeline uplift
  - **Partner** | Baseline pipeline | MDF allocation | Pipeline uplift
- **Chart:** Baseline vs. With-MDF forecast at month  $m+L$ .
- **Narrative:** 2–3 short paragraphs explaining the lag, biggest drivers, fairness split, and risks.

## Business impact

- Moves dollars to where evidence says they work, **without** starving promising partners.
- Reduces debate time; increases learning speed; keeps risk bounded by caps and K-split.
- Makes the pipeline **a shared performance contract**, not two disconnected stories.

## KPIs we track together

- Pipeline (or revenue) **per \$MDF** vs. last 3 months.
- **Policy adherence:** % within caps/floors.
- **Concentration:** share to top partner (bounded by K).
- **Uncertainty trend:** posterior variance down month-over-month.

## Bottom line

This is an **architecture** for joint ownership: a small, agentic loop that learns the delay, allocates under constraints, and explains itself—so Sales and Marketing can **sign one plan** and be measured against **one pipeline**.