

DAVID KAPLAN

Fractional Business Development & Strategic Partnerships

Optima Growth Strategies · www.OptimaGrowthStrategies.com

Director@OptimaGrowthStrategies.com | (509) 263-4625 | Remote From: Las Vegas, NV · Coronado, CA · Coeur d'Alene, ID

I identify transformational opportunities, build the strategic partnerships that bring them to life, and serve as the embedded executive who drives them to results—so your leadership team stays focused on building the company.

WHO I SERVE

You're a founder, CEO, or executive team that:

Seeks new revenue, distribution, or partnership channels—but lacks the internal bandwidth to pursue them;

Is evaluating a transformational strategic alliance, joint venture, or licensing agreement;

Operates in a fast-moving sector where a trusted operator must initiate first contact with high-value targets;

Cannot yet justify a full-time Business Growth & Development or Strategic Partnership executive (\$200K+), but needs that caliber of output and support;

Wants embedded, NDA-protected executive leadership—not a consultant who disappears after the presentation deck; and/or

Is entering new markets or geographies and needs a seasoned strategist to map and execute the path

ACTIVE CLIENT SECTORS

Commercial Real Estate · AI & Robotics · Sustainable Energy · Health & Wellness · Freight & Logistics · Construction Tech · Nonprofit / 501(c)(3)

WHAT I DO FOR YOU

Strategic Partnership Architecture

I identify, qualify, and structure alliances, JVs, and licensing agreements—including global manufacturer and distribution deals—that create durable competitive advantages and new revenue streams.

Business Growth, Development & New Business Opportunities

End-to-end BD execution: opportunity sourcing, pipeline creation, executive outreach, proposal development, and negotiate-to-close. Covers both outbound origination and inbound channel optimization.

Embedded Outsourced Executive Leadership

I serve as your fractional business growth, development, and strategic partnerships executive on a retained basis—attending your meetings, representing your brand, and executing your growth mandate as a true member of the leadership team.

Nonprofit & Corporate Partnership Development

Securing corporate sponsors, mission-aligned donors, and institutional partners for 501(c)(3) organizations through targeted campaigns and executive relationship management.

RECENT WORK · 33+ YEARS OF BUSINESS GROWTH, LEADERSHIP, AND DEVELOPING COLLABORATIVE OPPORTUNITIES

Wing Drone Delivery Brief

Optima for Last Mile Services & American Diamond Logistics · 2026

Authored a strategic partnership proposal positioning LMS and ADL as ground-layer partners to Alphabet's Wing drone platform—covering regulatory landscape, competitive analysis, and a four-scenario integration roadmap targeting 40M+ Americans.

Trifecta Platform Launch

Optima Growth Strategies · 2025–2026

Established the Trifecta Freight Intelligence Network—a strategic alliance between CMG, LMS, and ADL delivering an AI-infused unified freight ecosystem spanning strategy, infrastructure, and delivery execution.

\$78M CRE Portfolio Transaction

Rockwell Properties · 2020–2021

Facilitated an institutional medical office acquisition between Granite Group LLC and Four Springs Capital Trust—managing multi-party coordination across private and public institutional investors in a complex cross-market transaction.

J.D., Univ. of San Diego School of Law | B.A. Political Science, UC San Diego | CRPC® Merrill Lynch | Financial Advisor, Merrill Lynch Global Private Client | Major, U.S. Army Reserves – JAG Corps / Civil Affairs (Special Operations Forces)

What follows is a comprehensive overview of the business growth and development disciplines I bring to every client engagement. These are not siloed services—they are integrated capabilities that work together to build increased, sustainable revenue and strategic opportunities for growth.

GROWTH OFFENSE — Creating & Capturing New Opportunity

01 Pipeline Creation & Deal Origination

Identifying, sourcing, and initiating new business opportunities through outbound outreach, inbound channel activation, and market intelligence—building a qualified, prioritized pipeline that keeps the revenue funnel full.

02 Strategic Partnerships & Alliances

Building deep relationships with complementary companies to co-sell, collaborate, or bundle offerings—expanding reach, credibility, and distribution without proportional cost increases.

03 Market Entry & Expansion Strategy

Evaluating and executing entry into new geographies, verticals, or customer segments—with competitive mapping, strategic partner identification, channel selection, and phased go-to-market execution.

04 Channel Development

Creating and managing indirect sales channels—resellers, brokers, referral partners, and white-label arrangements—to scale distribution and reach customer segments that direct sales cannot cost-effectively serve.

05 Brand Positioning Through Relationships

Elevating company visibility and credibility through strategic introductions, industry presence, thought leadership partnerships, and high-value association with market leaders and institutional networks.

REVENUE ARCHITECTURE — Structuring Deals That Win

06 Negotiation & Deal Structuring

Leading or co-leading complex negotiations—partnerships, licensing agreements, acquisitions, and contracts—with a J.D. and 33+ years of high-stakes deal experience across CRE, financial services, and exclusive global manufacturing & product commercialization.

07 Revenue Strategy & Pricing Optimization

Shaping how the company monetizes: evaluating pricing models, deal packaging, and contract structures to maximize margin, win rates, and long-term account value—without leaving money on the table.

08 Key Account Expansion

Growing revenue within existing client relationships through strategic upsells, cross-sells, renewal optimization, and executive relationship deepening—turning satisfied customers into compounding revenue engines.

OPERATIONAL GROWTH INTELLIGENCE — Execution & Optimization

09 Cross-Functional Growth Initiatives

Working with marketing, product, finance, and operations teams to align messaging, refine offerings, and remove friction across the sales cycle—ensuring the entire organization is rowing toward the same revenue targets.

10 Data-Driven Growth Optimization

Leveraging AI-driven technologies to track and interpret KPIs that actually matter—pipeline velocity, conversion rates, CAC, LTV, and deal cycle time—then iterating rapidly on what drives the highest ROI and most durable growth.

ENGAGEMENT OPTIONS

Tier 1: Business Growth & Strategic Partnership Support

Best for founders and early-stage companies needing strategic BD leadership, pipeline activation, and/or strategic partnership development without full-time overhead.

- Opportunity pipeline creation and executive outreach
- Partner, client, and investor identification & qualification
- Strategic introductions within Optima's global network
- Market and competitive landscape analysis
- Brand positioning through high-value relationship development
- Strategic partnership development

10–20 hrs/mo · Starting at \$4,000/mo

Tier 2: Fractional Director of Business Development

Best for growth-stage companies needing embedded BD execution, full-spectrum alliance structuring, and capital network access.

- Full business growth, development, and strategic partnership strategy design, execution, and performance reporting
- JV, licensing, and global distribution negotiations
- Revenue strategy, pricing optimization, and deal structuring
- Key account expansion, upsell & renewal management
- Board- and C-suite-level strategic advisory

20–40 hrs/mo · Starting at \$7,000/mo

Ready to grow? Let's begin with a confidential, no-obligation conversation to explore goals and strategies.

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