

INTERNAL CORPORATE POLICY — BUSINESS DEVELOPMENT & STRATEGIC PARTNERSHIPS

Collaborative Shared Technologies LLC®

Effective Date: September 7, 2026

Purpose

This policy establishes the requirements and expectations for CEO-to-CEO capabilities briefings, strategic partnership discussions, teaming discussions, and business development meetings involving Collaborative Shared Technologies LLC®.

The purpose of this policy is to ensure executive meetings are purposeful, mutually beneficial, appropriately prepared, confidential when necessary, and focused on measurable business outcomes.

CEO meetings are intended to advance potential business relationships, evaluate complementary capabilities, identify viable contracting opportunities, and determine whether the organizations have a reasonable basis for future teaming, subcontracting, prime/subcontractor relationships, joint pursuits, or other strategic collaboration.

Meetings are not intended to serve solely as introductory networking conversations without defined business objectives.

1. Pre-Meeting Documentation Exchange

Before a CEO Capabilities Brief or Strategic Partnership Meeting is scheduled, both organizations are expected to exchange, at minimum:

- Current Capability Statement
- Past Performance Sheet or equivalent past performance summary

When relevant, the parties may also exchange:

- Corporate overview or capabilities presentation
- Contract vehicles
- Socioeconomic certifications
- NAICS and PSC codes
- Geographic or customer coverage
- Relevant technical competencies
- Partnering or subcontracting areas of interest

The purpose of the exchange is to allow both CEOs to evaluate organizational alignment before executive meeting time is committed.

2. Required Pre-Meeting Review

Exchanging documents alone does not constitute meeting preparation.

Each CEO or authorized executive representative is expected to review the other organization's Capability Statement and Past Performance Sheet before the meeting.

Participants should arrive prepared with substantive:

- Questions
- Comments
- Observations
- Areas of potential alignment
- Areas requiring clarification
- Capability gaps or complementary strengths
- Concerns that may affect teaming
- Potential customer or market overlaps

Meeting time should not be used to read or explain information that was already provided for advance review unless clarification or additional discussion is necessary.

This requirement is intended to maximize executive time and allow the meeting to focus on decisions, opportunities, and potential business outcomes.

3. Meeting Agenda Requirement

Every CEO Capabilities Brief or Strategic Partnership Meeting shall have an established agenda.

The agenda should be distributed before the meeting and may include:

1. Introductions and meeting objectives
2. Discussion of capability statements and past performance
3. Questions and observations arising from pre-meeting document review
4. Complementary capabilities and potential teaming alignment
5. Current and upcoming procurement opportunities
6. Potential prime/subcontractor roles
7. Capture or pursuit considerations, where authorized
8. Required follow-up activities

9. Decisions and action items
10. Next steps and responsible parties

Additional agenda topics may be added by mutual agreement before the meeting.

4. Results-Driven Meeting Standard

Collaborative Shared Technologies LLC® conducts CEO meetings with a results-driven business development approach.

The objective is not simply to establish that two companies have met.

Each meeting should seek to determine whether there is a practical basis for continued business engagement.

Where appropriate, meetings should conclude with one or more defined outcomes, including:

- Identification of potential teaming opportunities
- Identification of relevant RFPs, RFQs, RFIs, Sources Sought notices, task orders, or other procurements
- Agreement to conduct additional opportunity research
- Identification of potential prime and subcontractor roles
- Agreement to exchange additional technical or corporate information
- Introduction to another decision-maker, customer, program office, contracting professional, or teaming partner
- Development of a joint pursuit strategy
- Scheduling of a follow-on capture or opportunity meeting
- Determination that no current strategic alignment exists

A determination that the organizations should not pursue a relationship at the present time is also a valid business outcome.

5. Opportunity Contribution Expectation

CEO-to-CEO meetings should provide reciprocal business value.

Whenever practicable, both CEOs should arrive prepared to discuss specific current or anticipated business opportunities that may warrant consideration by the two organizations.

Potential opportunities may include:

- Federal RFPs, RFQs, RFIs, Sources Sought notices, and task orders
- State and local government procurements
- Corporate procurement opportunities
- Prime contractor subcontracting opportunities
- Contract vehicle opportunities
- Recompetes
- Pipeline opportunities
- Strategic customer pursuits
- Commercial opportunities
- Other opportunities appropriate for potential teaming or partnership

The meeting should evaluate whether the organizations possess complementary capabilities and whether pursuing an identified opportunity together creates a credible business advantage.

Neither party is obligated to disclose proprietary pipeline information unless appropriate confidentiality protections have first been established.

6. NDA Requirement for Protected Business Discussions

A Non-Disclosure Agreement (NDA) must be fully executed before Collaborative Shared Technologies LLC® discusses or discloses sensitive, confidential, proprietary, or competitively significant business information.

Protected discussions may include, but are not limited to:

- Capture management methodologies
- Capture strategies
- Business development methodologies
- Opportunity pipelines
- Customer intelligence
- Competitive intelligence
- Bid/no-bid strategies
- Pricing strategies
- Revenue information
- Financial information
- Contract values
- Internal forecasts
- Probability-of-win assessments
- Teaming strategies

- Competitive positioning
- Proposal strategies
- Proprietary methodologies
- Internal processes, tools, templates, frameworks, or intellectual property
- Nonpublic customer or partner information

An introductory capabilities discussion may occur without an NDA when the conversation is limited to non-confidential information.

However, once the discussion moves into protected capture, pipeline, financial, proprietary, or competitive information, the appropriate NDA must already be in effect.

No participant should assume that attendance at a meeting creates confidentiality obligations in the absence of an executed agreement.

7. Capture and Pipeline Discussions

Detailed capture and pipeline discussions are considered advanced business development activities and will not automatically form part of an introductory capabilities meeting.

Before discussing a specific opportunity in detail, the CEOs should determine:

- Whether both companies have a legitimate interest in the opportunity
- Whether organizational capabilities are complementary
- Whether there are known conflicts of interest
- Whether either organization has existing teaming restrictions
- Whether an NDA is in place
- Whether additional agreements may be necessary
- Which organization may be positioned as prime
- Which organization may be positioned as subcontractor
- What each organization could contribute to the pursuit

When appropriate, subsequent opportunity-specific discussions may require a separate Teaming Agreement, Subcontracting Agreement, Memorandum of Understanding, or other written agreement.

8. Action Items and Accountability

Meetings that result in agreed activities shall conclude with documented action items.

Each action item should identify, when applicable:

Action → Owner → Due Date → Expected Deliverable

Examples include:

- Exchange additional past performance
- Review an identified solicitation
- Conduct opportunity research
- Confirm contract vehicle eligibility
- Determine prime/subcontractor positioning
- Provide requested technical information
- Identify potential key personnel
- Make an agreed introduction
- Schedule a capture meeting
- Execute an NDA
- Develop a preliminary teaming strategy
- Provide a go/no-go recommendation

Both organizations are expected to complete agreed action items within the established timeframe or communicate promptly when circumstances prevent completion.

Repeated failure to complete agreed actions may be considered when determining whether additional executive meetings are warranted.

9. Meeting Records and Follow-Up

Following substantive meetings, Collaborative Shared Technologies LLC® may maintain an internal record of:

- Meeting date
- Participating organizations
- Participants
- Opportunities discussed
- Decisions reached
- Potential teaming relationships
- Action items
- Responsible parties
- Due dates
- Follow-up requirements
- Next meeting or decision point

Meeting documentation is intended to support business development continuity and accountability and does not create a contractual obligation unless expressly established through an authorized written agreement.

10. Meeting Scheduling

CEO Capabilities Brief and Strategic Partnership Meetings should be scheduled only after required pre-meeting documentation has been exchanged.

When applicable, the following sequence should occur:

Step 1 — Exchange Capability Statements

Step 2 — Exchange Past Performance Sheets

Step 3 — Review Materials

Step 4 — Identify Initial Questions and Potential Areas of Alignment

Step 5 — Execute NDA if protected information will be discussed

Step 6 — Identify Potential Opportunities for Discussion

Step 7 — Establish and Distribute Meeting Agenda

Step 8 — Schedule Microsoft Teams or Zoom Meeting

Step 9 — Conduct Results-Driven Executive Meeting

Step 10 — Document Decisions, Action Items, Owners, and Due Dates

11. Rescheduling or Declining Meetings

Collaborative Shared Technologies LLC® reserves the right to postpone, reschedule, or decline a CEO Capabilities Brief or Strategic Partnership Meeting when reasonable pre-meeting requirements have not been completed.

This may include situations where:

- Requested capability documentation has not been provided
- Past performance information has not been exchanged
- Materials have not been reviewed
- Required confidentiality agreements have not been executed
- No substantive meeting objective has been established
- Participants are not prepared to discuss potential areas of collaboration

- Repeated meetings have produced no meaningful follow-through or business progress

The intent of this provision is not to discourage relationship development. It is to protect executive time and ensure meetings remain productive and mutually valuable.

12. No Commitment or Guarantee

Participation in a CEO Capabilities Brief or Strategic Partnership Meeting does not constitute:

- A teaming commitment
- A subcontracting commitment
- A prime contractor commitment
- An exclusivity agreement
- A joint venture
- A commitment to bid
- A commitment to disclose proprietary information
- A commitment to provide pricing
- A commitment to share pipeline information
- A guarantee of future business
- A contractual relationship

Any binding business relationship must be established through an appropriate written agreement executed by authorized representatives of the respective organizations.

13. Professional and Reciprocal Engagement

Collaborative Shared Technologies LLC® values strategic relationships with organizations that demonstrate preparation, transparency, responsiveness, accountability, and reciprocal business interest.

CEO meetings should respect the time and business interests of both organizations.

The desired outcome is a disciplined executive relationship in which both organizations understand:

What each company does.

Where their capabilities complement one another.

Which opportunities may be worth pursuing together.

What each organization will contribute.

Who owns the next action.

When that action will be completed.

The objective is to move from introduction → alignment → opportunity → action → measurable business outcome.

Contact

Questions regarding this policy should be directed to:

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Founder & Chief Executive Officer

Collaborative Shared Technologies LLC®