LUCIANA PROTO | ADVISORY LATAM & MERCOSUL

BOUTIQUE STRATEGIC ADVISORY

Executive Sample Materials

Illustrative decision materials for market entry, regional intelligence, negotiation, executive follow-through, and operational due diligence.

ORIGINAL DESIGN. ILLUSTRATIVE EXAMPLES. CONFIDENTIAL.

This package demonstrates the structure, depth, and visual discipline of Luciana Proto Advisory materials. It is not a client report and does not contain actual client information or verified market data.

METHODOLOGY NOTE

From regional context to executive decision

A concise explanation of how boutique advisory work converts complexity into a structured sequence of choices, evidence, and action.

EXECUTIVE PERSPECTIVE

A decision is more reliable when the context, hypothesis, evidence, risk, and action are visible at the same time.

The advisory methodology is designed for high-value decisions across market entry, commercial partnerships, negotiation, and operating readiness.

1. Context

Clarify the strategic question, decision owner, operating constraints, and timing.

2. Hypothesis

Define the most plausible path forward and the assumptions that must be tested.

3. Evidence

Collect and organize market, stakeholder, commercial, and operating signals.

4. Decision

Translate evidence into choices, trade-offs, risks, and decision gates.

5. Action

Assign owners, milestones, and executive review points.

STRATEGIC IMPLICATION

The materials are designed to make the executive conversation more precise: What matters? What is unknown? What is the recommendation? Who owns the next action?

STRATEGIC DIAGNOSTIC

LATAM Initial Diagnostic

A disciplined decision framework for market prioritization, entry design, and the first 30 days of execution.

CLIENT / CONTEXT

Empresa Exemplo | Distributed Energy Solutions

MARKETS	HORIZON	DATE
Brazil | Uruguay | Argentina	30 days	June 2026

A credible market entry decision should distinguish scale potential from operational readiness - and sequence both deliberately.

EXECUTIVE PERSPECTIVE

Uruguay offers the fastest route to commercial validation, while Brazil holds the strongest longer-term scale potential.

The recommended sequence protects speed without confusing initial traction with regional readiness.

ARTICLE AT A GLANCE

The opportunity is credible across the three markets, but the operating conditions differ materially.

A staged entry reduces early commitment while preserving option value in Brazil.

Local partner selection is the most consequential near-term decision.

A 30-day evidence plan is sufficient to determine whether to advance.

Decision required

Approve a staged Uruguay-first validation model and authorize selective pipeline building in Brazil.

WHY THIS MATTERS NOW

The company can test price acceptance, channel behavior, and operating requirements in a market where stakeholder access and coordination are more manageable.

EXECUTIVE RECOMMENDATION

Use a non-exclusive partner pilot with explicit milestones; do not commit to country exclusivity until commercial and operating performance are validated.

KEY RISK

Early enthusiasm may result in a premature commitment to a partner whose commercial reach is stronger than its operational capacity.

Illustrative analysis. Values and scenarios are solely intended to demonstrate the advisory methodology.

EXECUTIVE PERSPECTIVE

The expansion hypothesis is credible only if the company separates commercial ambition from the capabilities required to deliver locally.

The diagnostic begins by making the starting position, operating assumptions, and evidence gaps explicit.

CURRENT STATE

Empresa Exemplo has a differentiated distributed-energy offer and existing cross-border experience, but it has limited local service infrastructure and no proven partner model in the target markets. The entry decision therefore depends less on product relevance than on the capacity to translate product relevance into reliable customer delivery.

CURRENT STATE	STRATEGIC CHOICE	DESIRED OUTCOME
Strong technical offer; limited local operating footprint.	Sequence entry through a test market before committing to scale.	Verified demand, reliable partner behavior, and documented decision gates.

QUESTIONS THAT REQUIRE EVIDENCE

- Can the target segment articulate a willingness to pay for the company's differentiated value proposition?
- Which local capabilities are genuinely required for installation, service, and post-sale assurance?
- What level of partner dependence is acceptable during the validation period?
- Which early results would justify a scale decision in Brazil?

EXECUTIVE PERSPECTIVE

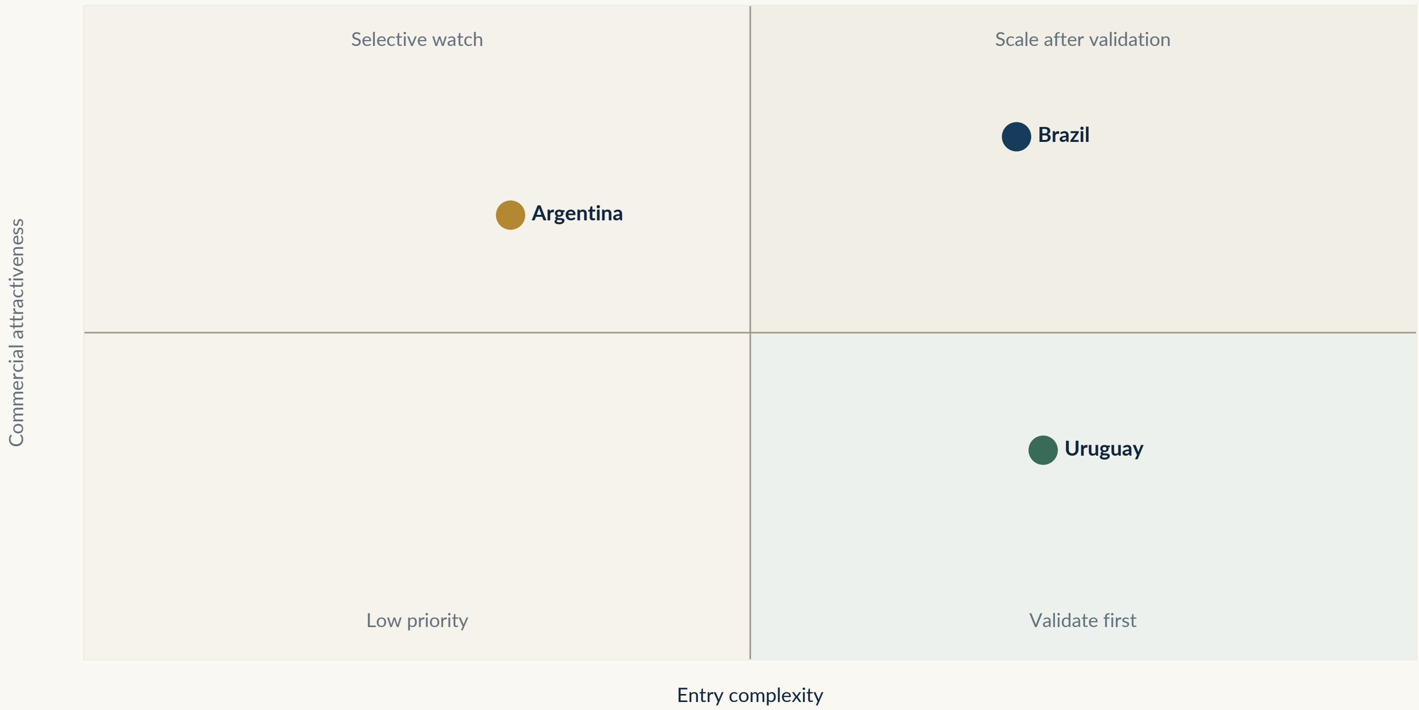
Uruguay is the preferred validation market; Brazil should be developed as a disciplined second-phase scale opportunity.

The market choice reflects a deliberate trade-off between speed, complexity, and long-term upside.

EXHIBIT 1

Market attractiveness versus entry complexity

Illustrative positioning based on commercial access, operating demands, and expected scale potential.



Market	Scale potential	Speed to validate	Operating complexity	Recommended role
Uruguay	Medium	High	Low-Medium	Validation market
Brazil	High	Medium	High	Second-phase scale
Argentina	Medium	Low-Medium	High	Selective monitoring

STRATEGIC IMPLICATION

The entry sequence should treat Uruguay as a controlled learning environment and Brazil as an opportunity that becomes more attractive once local operating evidence is in place.

EXECUTIVE PERSPECTIVE

The most material risk is not demand uncertainty; it is the possibility of committing to a route-to-market before execution responsibilities are clear.

The risk profile is manageable when the company uses staged commitments and makes ownership visible.

EXHIBIT 2

Risk exposure differs materially by market and should shape the entry sequence

1 = low exposure; 5 = high exposure. Illustrative assessment.

	Brazil	Uruguay	Argentina
Regulatory burden	3	2	3
FX exposure	3	3	4
Partner dependence	4	3	4
Contract enforcement	3	2	4
Service delivery	4	2	3

KEY OPPORTUNITIES

- Use Uruguay’s smaller but relationship-accessible market to validate the service model and commercial message.
- Build a Brazil account map in parallel to avoid delaying scale preparation after validation.
- Use partner evaluation as a dual test: access to demand and evidence of operational reliability.

EXECUTIVE PERSPECTIVE

A non-exclusive partner model offers the best balance of speed, control, and reversibility for the initial entry period.

The company should create evidence before it trades control for local reach.

EXHIBIT 3

The initial entry model should maximize learning while limiting irreversible commitments

Score: 1 = weak; 5 = strong. Illustrative assessment.

Criterion	Direct	Distributor	Technical partner	Alliance
Speed to market	2	4	4	3
Commercial control	5	2	3	4
Initial investment	2	4	4	3
Scalability	5	3	4	4
Operating risk	3	3	3	2

STRATEGIC IMPLICATION

A non-exclusive technical partner model should be adopted for 90 days, with explicit customer visibility, service responsibilities, and review rights.

EXECUTIVE PERSPECTIVE

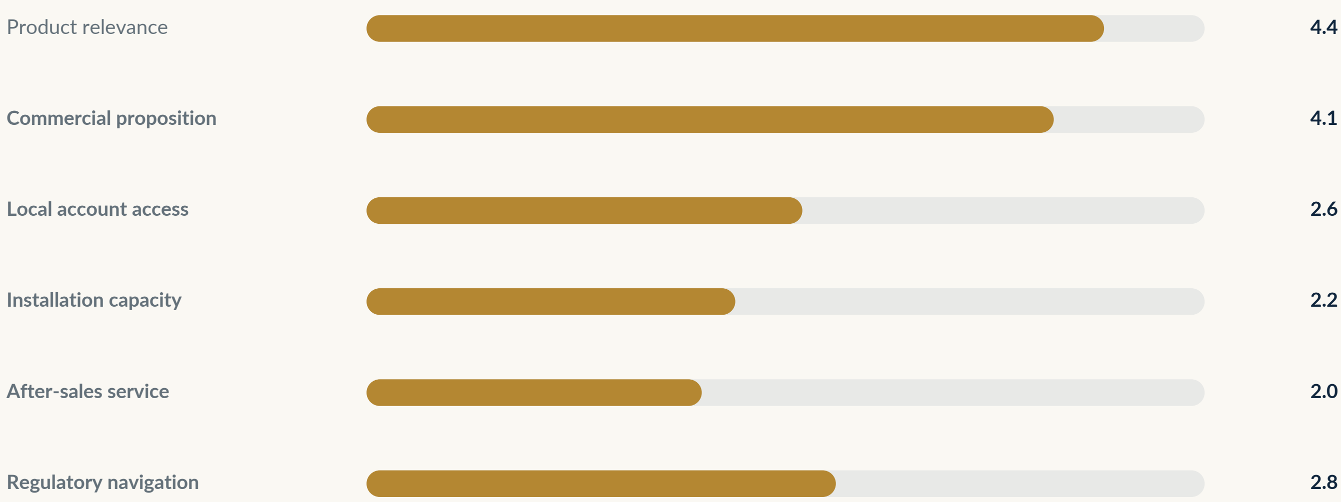
The company’s commercial proposition is stronger than its local execution infrastructure, making capability orchestration the critical entry challenge.

The entry model should close capability gaps through contracts and governance, not through assumptions.

EXHIBIT 4

Required capabilities are concentrated in local execution rather than product-market fit

Illustrative capability assessment: 1 = low readiness; 5 = high readiness.



Illustrative readiness score; not a client assessment.

IMPLICATION FOR OPERATING DESIGN

The company should not treat local support as a secondary implementation issue. In the target markets, installation, service assurance, and stakeholder responsiveness will shape credibility as much as the technical proposition itself.

EXECUTIVE PERSPECTIVE

The recommended entry architecture is narrow enough to create evidence and ambitious enough to preserve regional option value.

The next phase should not be a broad launch; it should be a controlled test of demand, partner performance, and operating requirements.

1. VALIDATE

Run a focused Uruguay pilot with three to five named accounts and a defined offer.

2. OBSERVE

Measure partner behavior against agreed sales, service, and reporting milestones.

3. PREPARE

Build Brazil market intelligence and priority-account hypotheses in parallel.

4. DECIDE

Use explicit evidence thresholds to determine whether to scale, adjust, or pause.

EXECUTIVE PERSPECTIVE

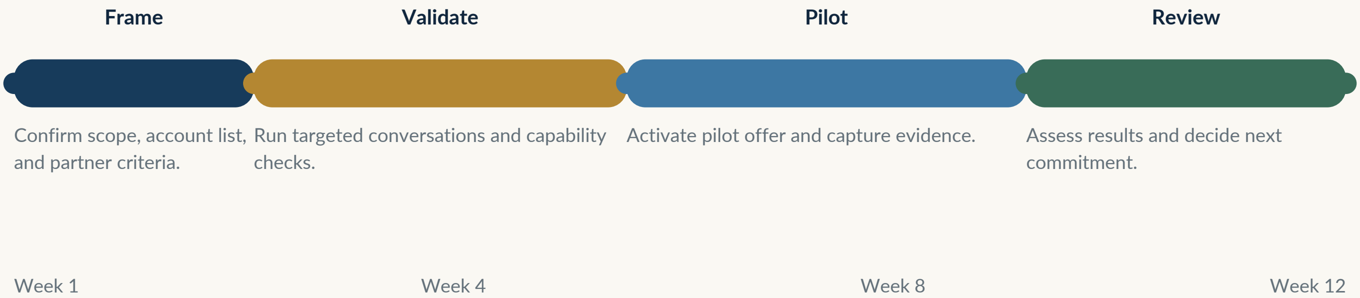
The first 30 days should produce evidence, not merely activity.

The action plan converts the diagnostic into an accountable sequence of commercial and operating decisions.

EXHIBIT 5

Thirty-day roadmap links action ownership to decision readiness

Illustrative roadmap for the first validation cycle.

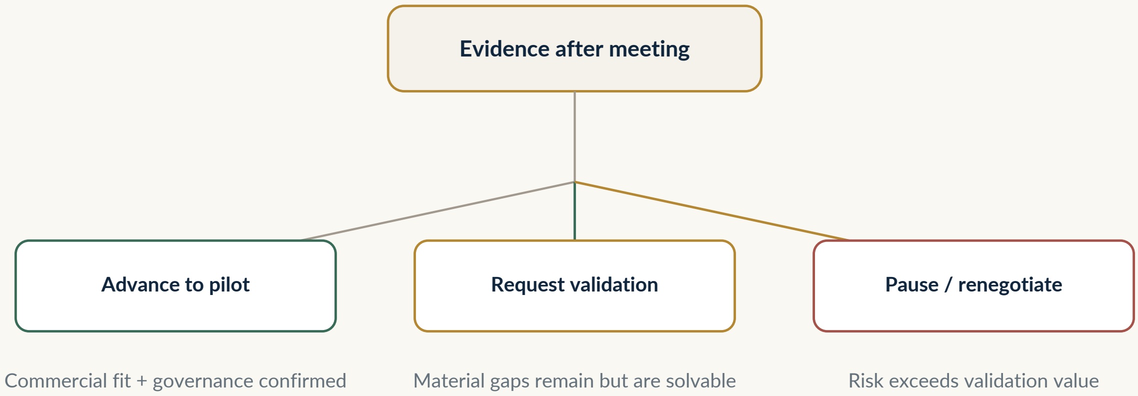


Action	Owner	Dependency	Success criterion	Delay risk
Confirm partner shortlist	Advisory + client lead	Selection criteria	2 candidates validated	Weak access
Prioritize accounts	Commercial lead	Segment hypothesis	5 accounts selected	Diffuse pipeline
Define pilot offer	Product + commercial	Service scope	Offer approved	Unclear service model
Run executive review	Leadership	Evidence pack	Go/no-go decision	Incomplete data

EXECUTIVE PERSPECTIVE

The company should advance only when commercial evidence and operating evidence reinforce each other.

Decision gates prevent early market enthusiasm from becoming a commitment that the operating model cannot support.



DECISION REQUIRED FROM LEADERSHIP

Approve a staged Uruguay validation program, preserve non-exclusivity, and set a formal 30-day executive review at which entry scope, partner commitment, and Brazil preparation will be reassessed.

STRATEGIC IMPLICATION

The right question is not “Should the company enter?” but “What evidence would make a larger commitment rational?”

EXECUTIVE PERSPECTIVE

The initial diagnostic converts regional complexity into an evidence-led sequence of choices.

The next step is a structured working session to align the client's internal owners around the validation plan.

RECOMMENDED NEXT STEP

Conduct a 90-minute working session with commercial, technical, and leadership representatives to confirm target accounts, partner criteria, pilot economics, service responsibilities, and the 30-day review agenda.

OUTPUTS OF THE WORKING SESSION

- Named account list and commercial hypotheses
- Partner shortlisting scorecard
- Pilot offer and service boundary
- Decision-gate calendar and owners

Illustrative example - designed to demonstrate advisory methodology and executive material quality.

MONTHLY INTELLIGENCE BRIEF

Mercosur Market Signal

A concise executive read of commercial, regulatory, operating, and competitive signals across the Mercosur region.

CLIENT / CONTEXT

Empresa Exemplo | B2B Technology

PERIOD	MARKETS	FOCUS
May 2026	Brazil | Argentina | Uruguay | Paraguay	Go-to-market

Regional momentum rarely moves in one direction. The advantage lies in knowing which signal deserves action and which deserves monitoring.

EXECUTIVE PERSPECTIVE

The region rewards companies that combine a clear value proposition with local execution discipline, not companies that simply increase commercial activity.

The month's signals suggest uneven conditions across markets but a shared need for sharper commercial prioritization.

ARTICLE AT A GLANCE

Uruguay remains the most agile market for relationship-led validation.

Brazil offers scale but requires a more deliberate local operating model.

Argentina's volatility rewards tight contractual and cash-flow controls.

Paraguay is attractive for selective channel plays, not broad market investment.

Decision required

Focus executive attention on converting a limited number of strategic accounts instead of broadening the prospect list.

WHY THIS MATTERS NOW

Sales-cycle complexity, regulatory variation, and delivery risk can absorb resources faster than pipeline volume creates value.

EXECUTIVE RECOMMENDATION

Prioritize a small set of target accounts and attach clear country-specific actions, ownership, and evidence thresholds.

KEY RISK

Commercial momentum may be overstated when opportunity identification is not separated from validated willingness to buy.

Illustrative analysis. Values and scenarios are solely intended to demonstrate the advisory methodology.

EXECUTIVE PERSPECTIVE

The operating environment remains uneven, but the most actionable signal is a growing premium on local execution discipline.

Commercial potential is present across the region; success depends on converting signals into a disciplined country-specific agenda.

EXECUTIVE PERSPECTIVE

Across the Mercosur region, the strategic challenge is not simply to identify opportunity. It is to distinguish between signals that justify immediate commercial action and signals that require a watching brief. The month's assessment favors focused account development, tighter operating ownership, and a more explicit distinction between pipeline and qualified demand.

EXECUTIVE TAKEAWAY

Companies that have a clear route to local delivery will convert regional uncertainty into an advantage; those that rely on remote commercial momentum will experience a larger gap between pipeline and revenue.

Illustrative composite operating attractiveness score; 1 = low, 5 = high.

EXECUTIVE PERSPECTIVE

Brazil carries the largest scale potential, while Uruguay delivers the most favorable combination of speed, access, and operating manageability.

A regional strategy should use different country roles instead of applying a uniform expansion model.

EXHIBIT 1

Country roles differ by scale, complexity, and commercial speed

Illustrative country dashboard, based on advisory decision criteria.

Criterion	Brazil	Argentina	Uruguay	Paraguay
Commercial scale	5	3	3	2
Operating complexity	2	2	4	3
Decision speed	2	2	5	3
Partner availability	4	3	4	3
FX pressure	3	2	4	3

STRATEGIC IMPLICATION

The regional agenda should combine a scale play in Brazil, a validation role in Uruguay, selective opportunity management in Argentina, and channel-led exploration in Paraguay.

EXECUTIVE PERSPECTIVE

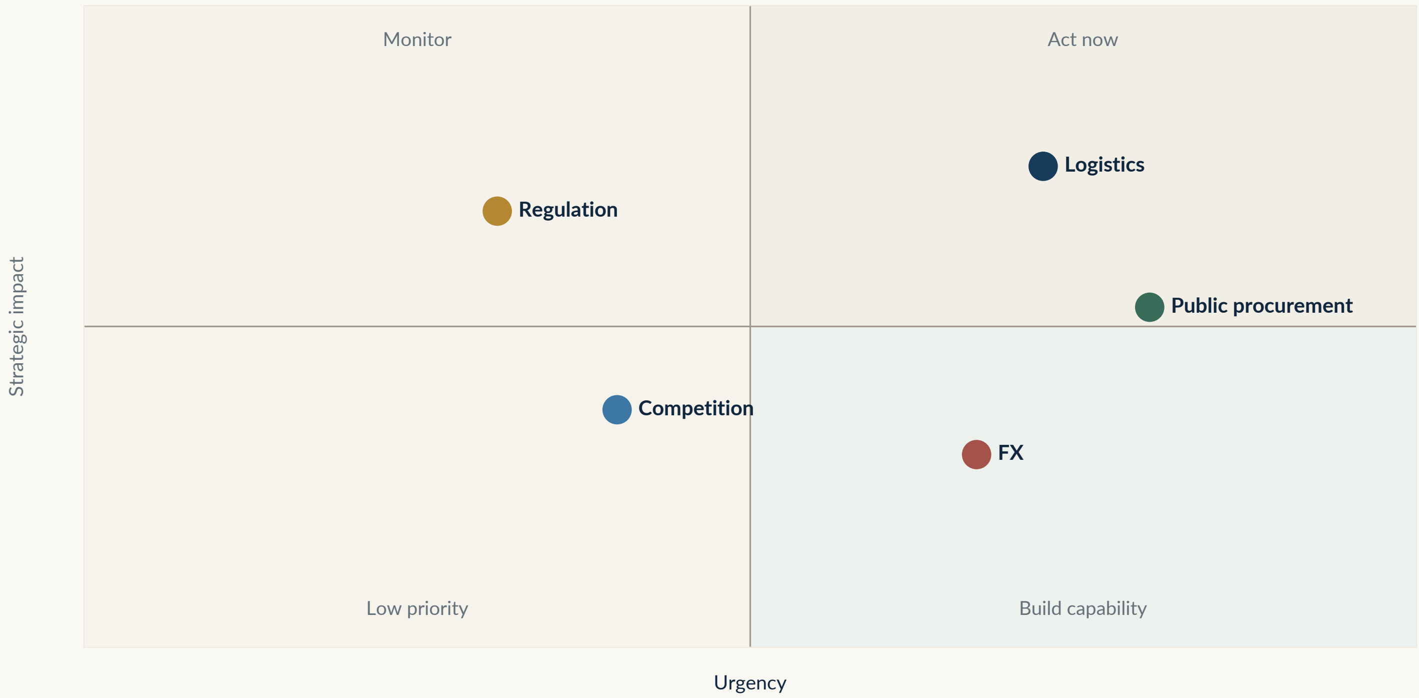
The month's most important signals require different responses: some should move the commercial plan, while others should tighten operating controls.

The value of intelligence lies in its ability to differentiate action from noise.

EXHIBIT 2

Commercial and operating signals should be prioritized by impact and urgency

Illustrative assessment of market signals affecting the client's route to market.



STRATEGIC IMPLICATION

The immediate agenda should focus on operating readiness and priority accounts; currency and competition should remain part of contractual and pricing discipline rather than drive market selection alone.

EXECUTIVE PERSPECTIVE

Each market requires a distinct commercial posture; the same go-to-market behavior will not produce comparable results across the region.

Country-level implications convert regional context into specific executive action.

Brazil

Signal: strong scale potential, high operating expectation.

Action: build a named-account thesis and validate local service capacity before broad outreach.

Argentina

Signal: opportunities exist, but cash-flow and contractual discipline are critical.

Action: use selective, risk-priced opportunities rather than broad investment.

Uruguay

Signal: relationship access and coordination favor controlled validation.

Action: prioritize partner and customer proof points over broad market coverage.

Paraguay

Signal: channel potential is present in narrower segments.

Action: explore distributor-led options with limited resource commitment.

EXECUTIVE PERSPECTIVE

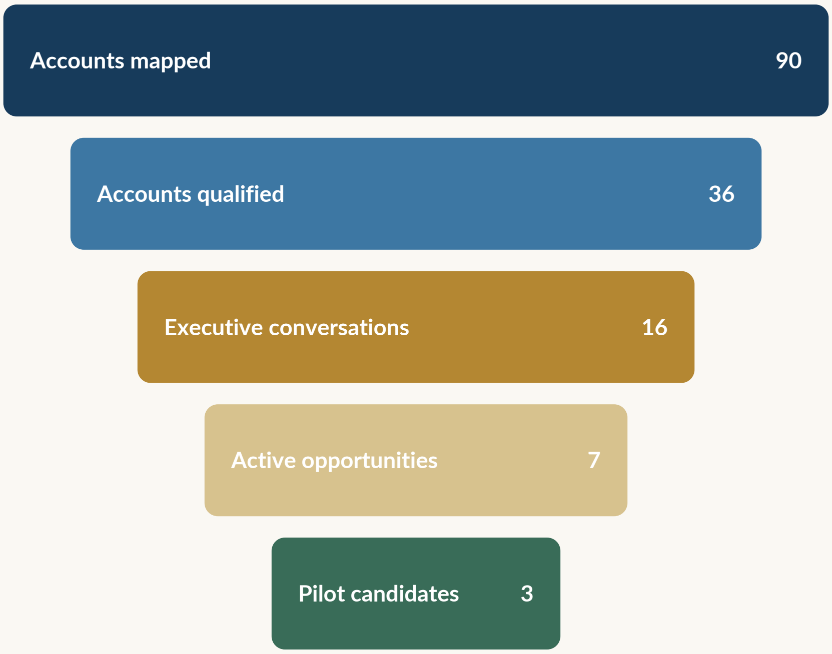
Pipeline quality is a better indicator of regional readiness than the number of opportunities identified.

The client should measure advancement through evidence of account fit, stakeholder access, and delivery feasibility.

EXHIBIT 3

The relevant commercial funnel becomes narrower as evidence replaces initial interest

Illustrative pipeline figures for demonstration purposes only.



STRATEGIC IMPLICATION

Management should avoid expanding the prospect list until the team has converted a defined set of qualified accounts into evidence-based opportunities.

EXECUTIVE PERSPECTIVE

The next 30 days should concentrate executive attention on five actions that protect both commercial momentum and operating credibility.

The agenda translates the intelligence brief into accountable work.

Priority action	Country	Owner	Evidence required	Timing
Confirm named-account focus	Brazil	Commercial lead	Account rationale + stakeholder map	Week 1
Validate partner capacity	Uruguay	Regional lead	Technical/service evidence	Week 1-2
Review pricing safeguards	Argentina	Finance + commercial	FX / payment controls	Week 2
Test channel hypothesis	Paraguay	BD lead	Distributor conversation outcomes	Week 2-3
Hold executive review	Region	Leadership	Pipeline and risk pack	Week 4

STRATEGIC IMPLICATION

The recommended agenda is intentionally narrow: regional advantage comes from converting a small number of informed choices into momentum, not from monitoring everything equally.

EXECUTIVE PERSPECTIVE

The monthly signal is valuable only when it changes a decision, a meeting agenda, or a resource allocation.

The following agenda should be reviewed with the client's commercial and operating owners.

EXECUTIVE AGENDA FOR THE NEXT 30 DAYS

- Review the named-account funnel and confirm which opportunities warrant leadership access.
- Reassess partner readiness using evidence rather than relationship confidence.
- Align country-specific pricing, contract, and service assumptions.

STRATEGIC IMPLICATION

The region should be managed as a portfolio of distinct operating plays - not as a single market with different flags.

EXECUTIVE PERSPECTIVE

Methodology notes and illustrative assumptions

This sample shows the structure of an executive intelligence brief; it does not describe actual market data, clients, or recommendations.

METHODOLOGY

The monthly assessment combines desk research, local operating experience, structured interviews when applicable, and a client-specific decision framework. Signals are prioritized according to impact, urgency, reversibility, and relevance to the agreed commercial thesis.

USE OF ILLUSTRATIVE INFORMATION

All country positions, scores, figures, and examples in this sample are illustrative. The final advisory material would be grounded in the client's actual offer, markets, account data, local stakeholders, and decision context.

EXECUTIVE MEETING PREPARATION

Negotiation Preparation

A decision-ready negotiation brief for local partners, distributors, suppliers, and strategic stakeholders.

CLIENT / CONTEXT

Empresa Exemplo | Infrastructure & Technical Services

MEETING	OBJECTIVE	DATE
Potential partner in Uruguay	Distribution agreement	June 2026

The purpose of preparation is not to script a meeting. It is to make the right trade-offs visible before the meeting begins.

EXECUTIVE PERSPECTIVE

The negotiation should prioritize a non-exclusive pilot, verifiable performance milestones, and governance before any territorial commitment.

The structure limits downside while creating a realistic path to deepen the relationship if the partner performs.

ARTICLE AT A GLANCE

The counterpart is commercially attractive but requires validation of operating capacity.

An initial pilot should be framed as a joint learning period, not a concession.

Territory, exclusivity, and service levels are the central value-exchange variables.

Internal alignment on red lines is necessary before the meeting.

Decision required

Authorize the team to pursue a 90-day pilot with conditional expansion rights and explicit reporting obligations.

WHY THIS MATTERS NOW

The proposed framework allows the company to observe execution behavior before it creates territorial dependency.

EXECUTIVE RECOMMENDATION

Trade limited pilot economics for data access, commercial transparency, and a formal review point.

KEY RISK

A relationship-first negotiation may create informal commitments that are difficult to unwind later.

Illustrative analysis. Values and scenarios are solely intended to demonstrate the advisory methodology.

EXECUTIVE PERSPECTIVE

The negotiation should be designed as a structured test of mutual value, not as a one-off conversation about commercial enthusiasm.

The client should enter the meeting with a clear hypothesis of the agreement it can responsibly support.

NEGOTIATION THESIS

The counterpart's access to the target market creates value, but the initial agreement should preserve the client's flexibility until delivery capability, account transparency, and governance behavior have been observed. The proposed negotiation posture is firm on territory and service accountability, but flexible on the initial economics of a time-bound pilot.

Objective	Target outcome	Minimum acceptable	Red line
Commercial	90-day pilot with defined target accounts	Non-exclusive test arrangement	Territory exclusivity before evidence
Operating	Service responsibilities documented	Named technical owner	Unspecified service obligations
Governance	Monthly review and data access	Shared account reporting	No visibility into client activity

EXECUTIVE PERSPECTIVE

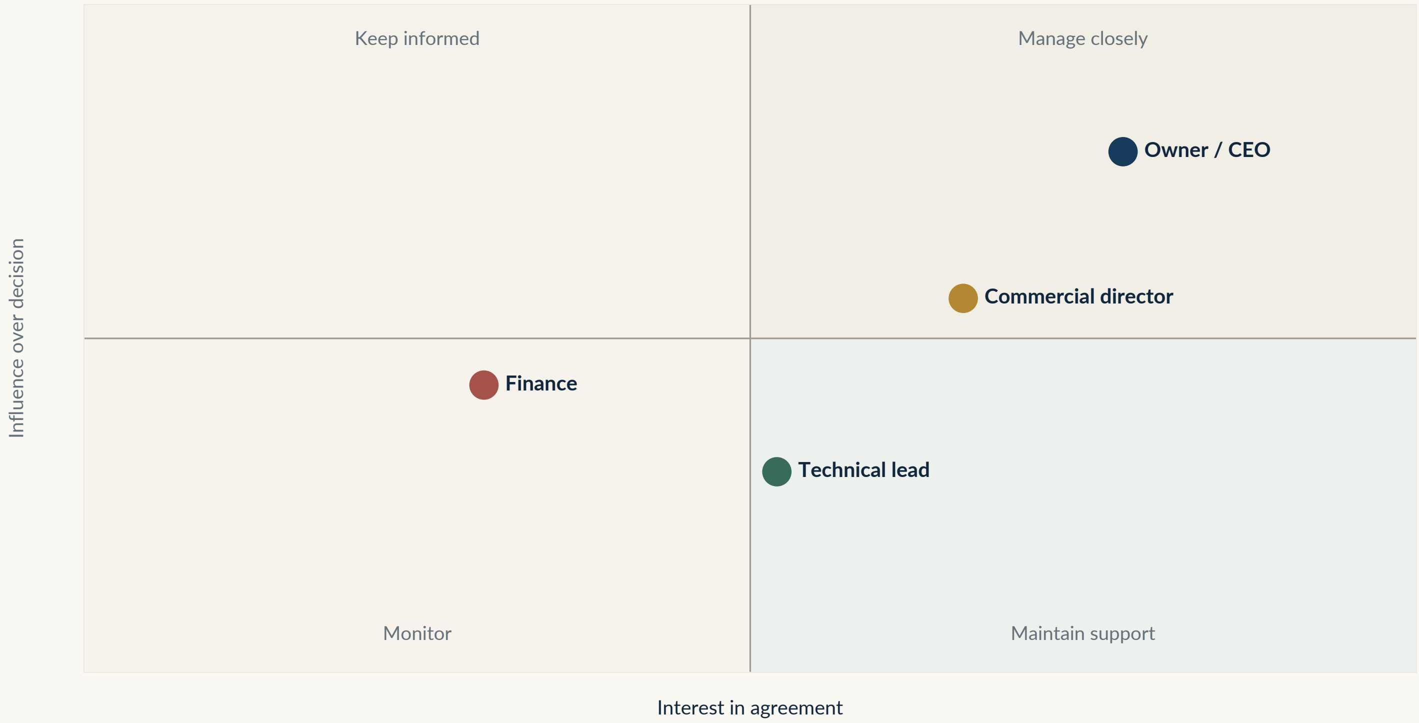
Stakeholder influence is concentrated in a small number of people, making preparation for the informal decision process as important as the formal meeting agenda.

The team should map not only who attends, but who shapes the decision before and after the room.

EXHIBIT 1

Stakeholder map shows where influence and interest are likely to concentrate

Illustrative stakeholder positioning for a potential distribution negotiation.



STRATEGIC IMPLICATION

The meeting strategy should address the owner's risk perception, the commercial director's upside case, and the technical lead's confidence in delivery simultaneously.

EXECUTIVE PERSPECTIVE

The most productive negotiations expose differences early and create a limited exchange of concessions around a shared pilot objective.

The following map turns vague alignment into specific tradable variables.

Client interest	Counterpart interest	Convergence	Potential concession	Not negotiable
Account transparency	Territory clarity	Pilot account list	Marketing support	Exclusive territory
Service reliability	Manageable obligations	Defined service scope	Pilot training	Unbounded service commitment
Evidence before scale	Economic upside	Review point at 90 days	Launch incentive	No performance reporting

STRATEGIC IMPLICATION

The client can trade early pilot economics or marketing support, but should not trade control of customer visibility, service standards, or the right to reassess territory.

EXECUTIVE PERSPECTIVE

A disciplined meeting sequence will create more information than a presentation-led meeting, and will make the counterpart's execution logic visible.

The meeting should be structured as discovery, proposal, testing, and commitment.

1. Open

Confirm shared objective and market context.

2. Diagnose

Test market access, operating capacity, and target accounts.

3. Propose

Introduce pilot structure and governance conditions.

4. Test

Surface concerns and validate willingness to commit.

5. Close

Agree evidence, owners, dates, and documentation.

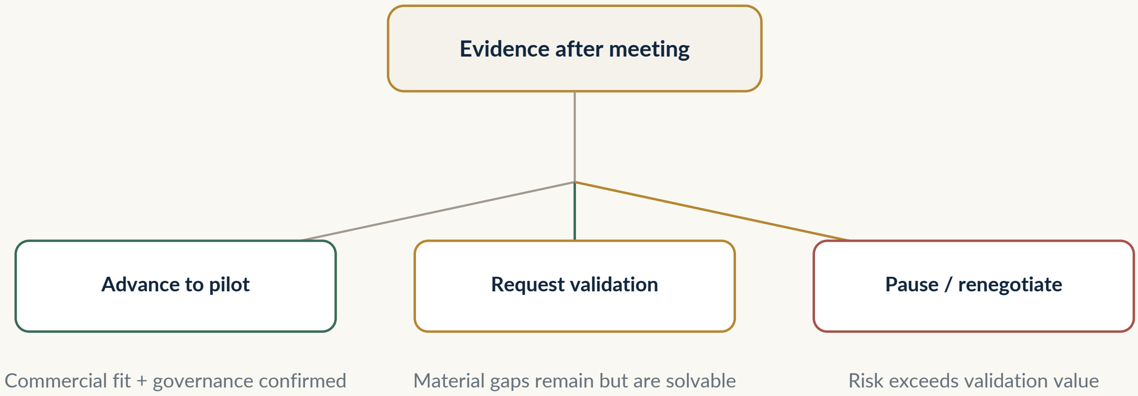
CRITICAL QUESTIONS

- Which three accounts would each party jointly prioritize during the pilot?
- What evidence would demonstrate the counterpart can support the service model?
- Which condition would make either party unwilling to continue after 90 days?

EXECUTIVE PERSPECTIVE

The team should treat the post-meeting decision as a choice among three explicit paths, not as a vague sense of progress.

The decision tree prevents ambiguity from becoming an unexamined commitment.



Scenario	Evidence	Recommended posture
Ideal	Pilot scope, account visibility, service ownership, and review point agreed	Advance to pilot
Acceptable	Commercial interest confirmed; limited technical evidence remains	Advance with validation conditions
Alert	Requests for exclusivity or unclear service responsibilities	Pause or renegotiate

EXECUTIVE PERSPECTIVE

The recommended posture protects learning, preserves commercial option value, and gives the counterpart a credible path to deeper collaboration.

The proposal should feel constructive, but it should also make governance non-negotiable.

EXECUTIVE RECOMMENDATION

Offer a 90-day, non-exclusive pilot that covers a defined account list, clear commercial and technical roles, shared reporting, and a scheduled review. Position the pilot as a joint mechanism for proving the economics and operating model before either party commits to broader territory or investment.

STRATEGIC IMPLICATION

Negotiation quality will be measured not by agreement reached in the room, but by the evidence and accountability embedded in the agreement that follows.

EXECUTIVE PERSPECTIVE

Preparation checklist and internal alignment requirements

The following pre-meeting checklist ensures the client enters the conversation with one coherent position.

Item	Internal owner	Status to confirm before meeting
Pilot economics	Commercial + finance	Approved negotiating range
Territory position	Leadership	Non-exclusive 90-day pilot endorsed
Technical scope	Operations	Service responsibilities defined
Account data	Commercial	Priority-account list ready
Governance	Advisory + legal	Reporting and review structure drafted

Illustrative negotiation preparation. The final brief would be tailored to the specific parties, commercial context, legal constraints, and decision authority involved.

EXECUTIVE FOLLOW-THROUGH

Executive Meeting Summary

A practical mechanism for converting executive discussions into accountable decisions, actions, and follow-up.

CLIENT / CONTEXT

Empresa Exemplo | Industrial Services

MEETING	FORMAT	DATE
Commercial partnership validation	Buenos Aires / Video conference	June 2026

A meeting becomes valuable only when its decisions are owned, its assumptions are visible, and its next steps are time-bound.

EXECUTIVE PERSPECTIVE

The meeting created alignment on a pilot pathway, but two operating assumptions still require validation before execution begins.

The next 30 days should convert verbal alignment into documented accountabilities, evidence, and a decision on scope.

ARTICLE AT A GLANCE

The parties agreed on the priority market and a preliminary route to market.

Commercial ownership is clear, but technical-service ownership remains unresolved.

The partnership economics can proceed to a pilot basis.

A structured review in 30 days is required.

Decision required

Confirm the pilot scope, nominate technical ownership, and approve the documentation sequence.

WHY THIS MATTERS NOW

Without clarity on technical execution, commercial enthusiasm can create an unsupported market commitment.

EXECUTIVE RECOMMENDATION

Use a shared action register and require evidence-based review before expanding the pilot.

KEY RISK

The project may lose momentum if the responsible owners assume that the other party will coordinate the technical track.

Illustrative analysis. Values and scenarios are solely intended to demonstrate the advisory methodology.

EXECUTIVE PERSPECTIVE

The meeting created enough alignment to move forward with a pilot pathway, but technical execution ownership remains a decision that cannot be deferred.

The summary converts discussion into decisions, responsibilities, and a concrete 30-day follow-through agenda.

MEETING CONTEXT

The parties met to validate commercial interest in a partnership model for the Uruguayan market. The discussion confirmed initial demand assumptions and willingness to explore a pilot, but it also highlighted a gap in the definition of technical service responsibilities. That gap is manageable only if it is assigned to named owners before the pilot begins.

PRIMARY DECISION

Proceed to a controlled pilot only after the parties document the service model, confirm the priority account list, and nominate accountable owners.

EXECUTIVE PERSPECTIVE

Three decisions were taken; two issues remain open; all five items should be managed through one shared action register.

A concise governance mechanism is more useful than a long meeting narrative.

Decision / issue	Rationale	Owner	Timing	Impact
Proceed with pilot design	Commercial fit appears sufficient for validation	Regional lead	Week 1	High
Prioritize five accounts	Focus required to test demand and delivery	Commercial lead	Week 1	High
Document technical role	Service obligations need clarity	Operations lead	Week 1-2	High
Confirm pilot economics	Commercial logic must be bounded	Finance + commercial	Week 2	Medium
Schedule executive review	Pilot needs decision gate	Leadership	Week 4	High

STRATEGIC IMPLICATION

The pilot can begin only once commercial and operational responsibilities are treated as one integrated plan rather than parallel workstreams.

EXECUTIVE PERSPECTIVE

The next 30 days should focus on converting alignment into evidence, accountability, and a decision on whether the model can scale.

The following timeline makes the execution path visible to both parties.

EXHIBIT 1

Thirty-day action plan converts the meeting into accountable follow-through

Illustrative timeline and ownership framework.

Action	Owner	Dependency	Completion evidence
Account selection	Commercial leads	Segment criteria	Named list validated
Service model	Technical owners	Role clarity	Documented responsibilities
Pilot offer	Commercial + finance	Economics	Approved offer
Executive review	Leadership	Evidence pack	Go / no-go agenda

EXECUTIVE PERSPECTIVE

The main execution risk is a coordination gap between commercial momentum and technical readiness.

The next meeting should therefore be designed to resolve responsibilities, not merely to review status.

RISKS AND OPEN ITEMS

Technical ownership

No named service owner has been confirmed.

Recommended action: Assign one technical owner from each party.

Account prioritization

The proposed list remains broader than a pilot can support.

Recommended action: Limit to five target accounts.

Pilot economics

The incentive structure is not yet documented.

Recommended action: Confirm a bounded commercial model.

Governance

No shared review mechanism exists.

Recommended action: Create a weekly action register and a 30-day executive review.

EXECUTIVE PERSPECTIVE

The executive review should answer one question: has the pilot produced enough commercial and operating evidence to justify deeper commitment?

The decision should be taken against pre-agreed evidence thresholds, not against general enthusiasm.

NEXT MEETING AGENDA

- Review account engagement, stakeholder feedback, and early commercial signals.
- Assess service delivery readiness and exceptions observed during the pilot.
- Confirm whether the partnership model meets the agreed governance conditions.
- Decide whether to scale, redesign, or pause the approach.

STRATEGIC IMPLICATION

The meeting summary is not a record of conversation. It is a mechanism for deciding what will happen next and who owns it.

STRATEGIC ENTRY DESIGN

Market Entry Plan

A market-entry architecture for validating demand, selecting a route to market, and establishing decision gates before structural investment.

CLIENT / CONTEXT

Empresa Exemplo | Energy Efficiency Solutions

TARGET MARKET
Uruguay

HORIZON
90 days

MODEL
Partner / distributor

A successful market entry is not a single choice. It is a sequence of commitments that should become more ambitious only as evidence increases.

EXECUTIVE PERSPECTIVE

A staged entry through a controlled partner model is the most balanced route to validate demand before building a dedicated local structure.

The plan prioritizes early evidence, commercial control, and explicit decision gates over immediate scale.

ARTICLE AT A GLANCE

The market is attractive enough to test but not yet mature enough to justify structural investment.

A partner model is viable when the company retains account visibility and performance governance.

The initial commercial focus should be narrow and sector-led.

Financial exposure should increase only after demand and delivery capability are verified.

Decision required

Approve a 90-day Uruguay entry program anchored in targeted account validation and conditional partner activation.

WHY THIS MATTERS NOW

The proposed sequence builds a reliable evidence base before major resource commitments are made.

EXECUTIVE RECOMMENDATION

Start with a short list of high-fit accounts and use the first 90 days to test both demand and partner execution.

KEY RISK

An overly broad account strategy may create activity without the evidence needed for a confident go/no-go decision.

Illustrative analysis. Values and scenarios are solely intended to demonstrate the advisory methodology.

EXECUTIVE PERSPECTIVE

The appropriate market-entry strategy is a sequence of increasing commitments, each justified by new evidence.

The entry plan should turn market ambition into a practical architecture of decisions, capabilities, and milestones.

ENTRY THESIS

The company should enter Uruguay through a focused partner-enabled model. The initial objective is not broad market coverage; it is to validate customer demand, test the partner's ability to support commercial and technical delivery, and establish a decision framework for further investment. Brazil should be prepared in parallel as a second-phase scale market.

ENTRY LOGIC

Validate demand -> prove local execution -> establish a repeatable partner model -> decide whether to scale the commercial footprint.

EXECUTIVE PERSPECTIVE

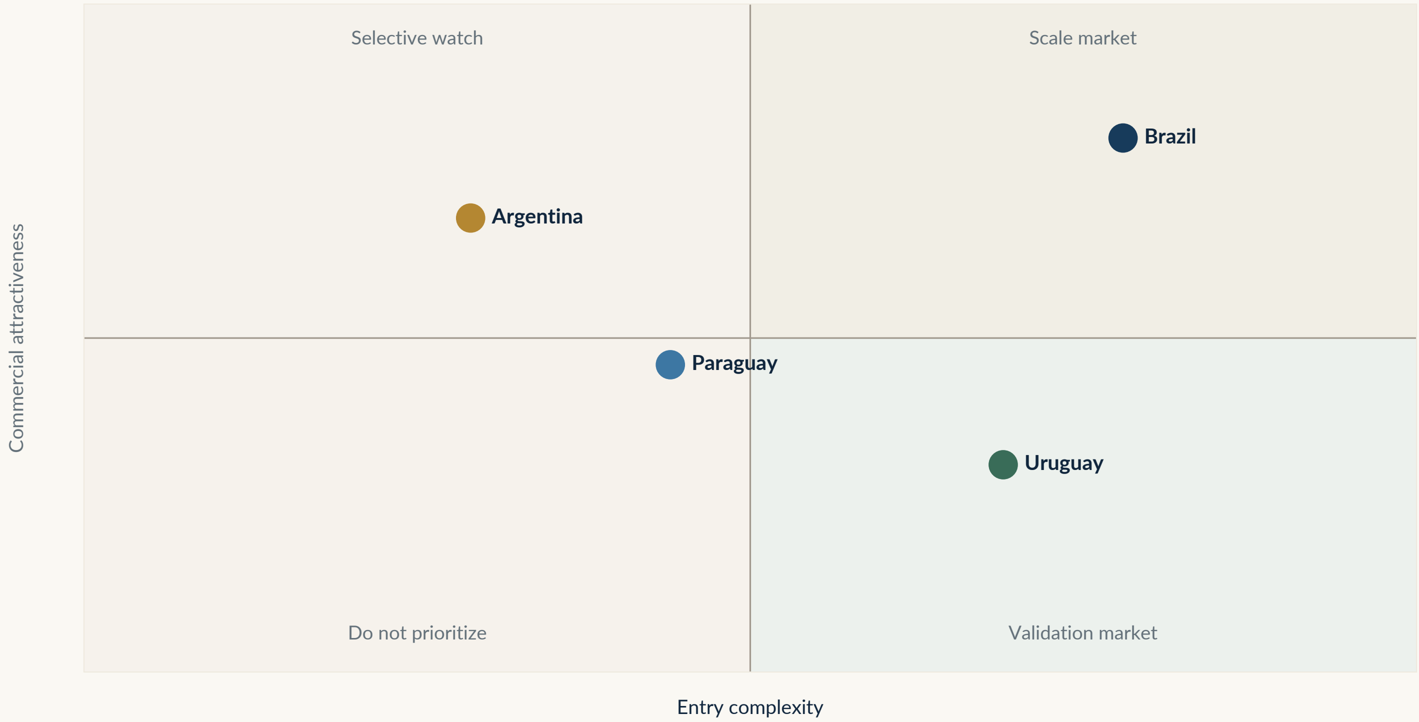
Market selection should be based on the intersection of commercial potential, route-to-market practicality, and the company's ability to execute.

The choice of first market is not necessarily the choice of largest market.

EXHIBIT 1

A staged market selection approach distinguishes validation from scale

Illustrative comparison based on client-specific market-entry criteria.



STRATEGIC IMPLICATION

Uruguay is not selected because it is the largest market; it is selected because it offers the most efficient way to test the business model before scaling effort in Brazil.

EXECUTIVE PERSPECTIVE

The recommended entry model should secure speed and access without allowing the company to lose visibility, governance, or the ability to adapt.

The partner route is appropriate only if commercial and operating information remain visible to the client.

EXHIBIT 2

A controlled partner model offers the strongest initial balance between market access and reversibility

Score: 1 = weak; 5 = strong. Illustrative assessment.

Criterion	Direct	Distributor	Technical partner	Joint venture
Speed	2	4	4	2
Control	5	2	3	4
Upfront investment	2	4	4	1
Learning value	4	3	5	4
Scalability	5	3	4	5
Risk	3	3	3	2

STRATEGIC IMPLICATION

The partner model should be designed around data access, service accountability, and a timed review point. Without those features, speed becomes dependency.

EXECUTIVE PERSPECTIVE

The first commercial focus should be narrow: a defined customer profile, a short list of account archetypes, and a value proposition that addresses a concrete operating pain point.

A broad market message may create interest, but a focused segment strategy creates evidence.

Segment	Customer profile	Value proposition	Typical buying trigger	Entry barrier
Industrial facilities	Energy-intensive private operators	Reduce operating cost and improve predictability	Rising cost / reliability issue	Technical validation
Commercial real estate	Portfolio managers / asset owners	Improve efficiency and reporting	Tenant / ESG requirement	Budget cycles
Public / institutional	Infrastructure or public-service entities	Resilience and lifecycle value	Modernization / procurement window	Procurement process

STRATEGIC IMPLICATION

The company should begin with industrial and institutional archetypes where the value proposition can be connected to a visible operational or reliability problem.

EXECUTIVE PERSPECTIVE

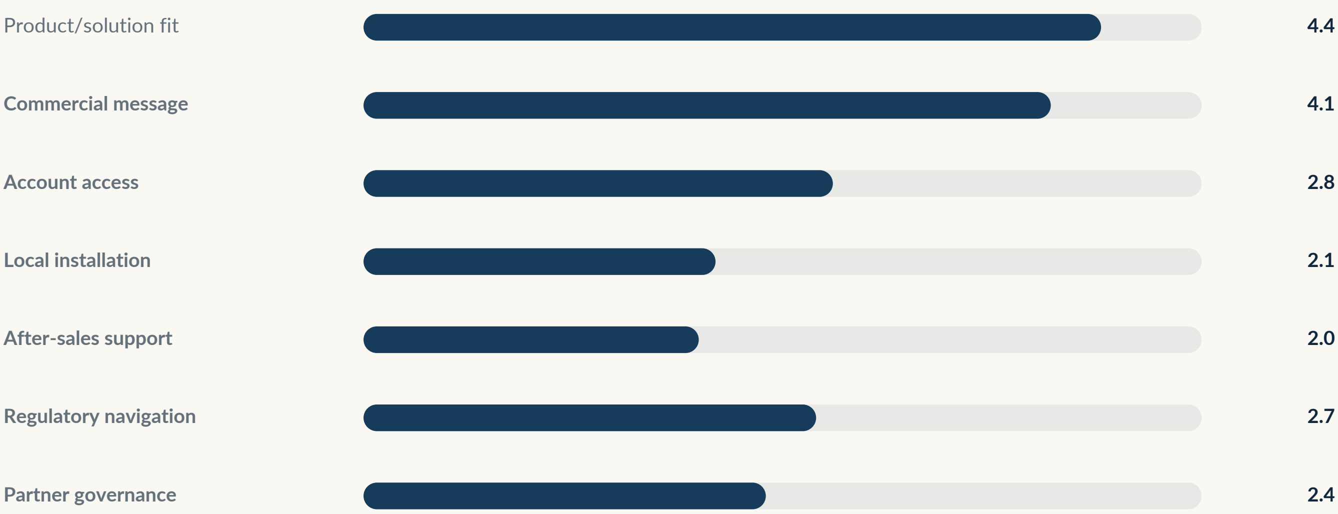
The entry model must close three gaps: local account access, technical delivery, and regulatory navigation.

The company should build these capabilities through a combination of internal ownership, partner obligations, and advisory support.

EXHIBIT 3

The capability gap is concentrated in local operating execution, not in product attractiveness

Illustrative readiness score; 1 = low, 5 = high.



Illustrative readiness score.

STRATEGIC IMPLICATION

A partner can provide a route to market, but the client must retain clear ownership of key accounts, service standards, and the executive relationship with the market.

EXECUTIVE PERSPECTIVE

The first 90 days should create three types of evidence: demand evidence, partner evidence, and operating evidence.

The roadmap makes each evidence stream visible and converts it into decision gates.

EXHIBIT 4

The 90-day roadmap sequences validation, activation, and decision

Illustrative market-entry program.

Validate
Confirm target accounts, offer, and partner fit.

Approach
Engage accounts and formalize pilot design.

Activate
Run pilot and observe delivery behavior.

Decide
Assess evidence and determine next commitment.

Week 1 | Week 4 | Week 8 | Week 12

Decision gate	Evidence needed	Decision if met	Decision if not met
Day 30	Target-account engagement + partner validation	Activate pilot	Adjust segment/partner
Day 60	Pipeline quality + service readiness	Expand test accounts	Resolve execution gaps
Day 90	Commercial traction + operating proof	Scale / deepen model	Pause or redesign

EXECUTIVE PERSPECTIVE

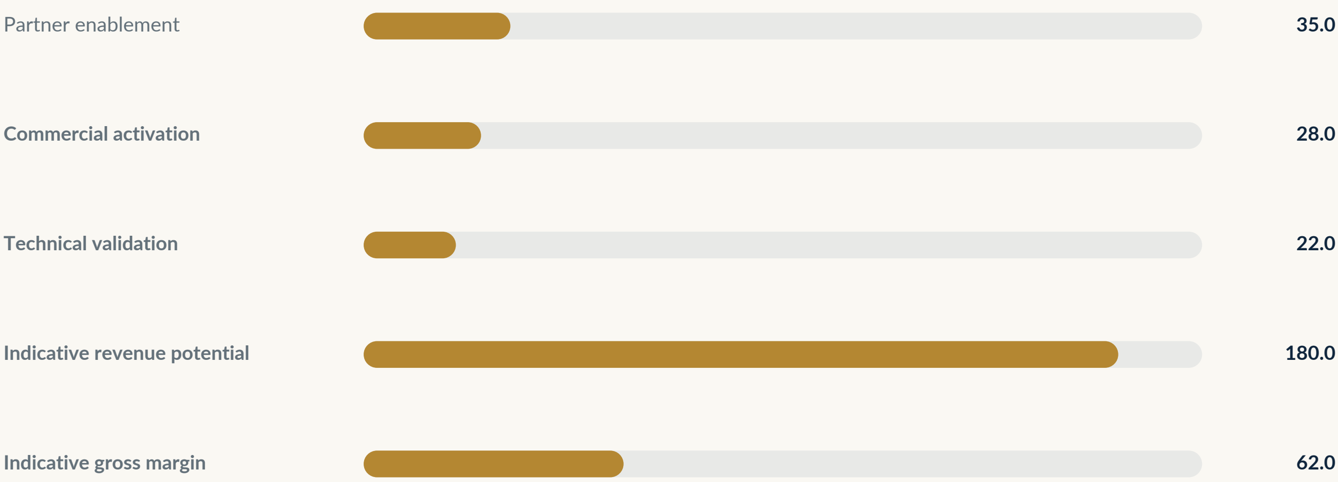
The financial case should be treated as a range of scenarios, not a promise of revenue.

The purpose of the business case is to set investment discipline and identify the assumptions that matter most.

EXHIBIT 5

The initial program can remain financially contained if the company stages investment behind evidence

Illustrative 12-month scenario; values are not client forecasts.



Illustrative values in USD thousands, except margin (%) shown as a comparison indicator.

SCENARIO ASSUMPTIONS

The scenario assumes a small number of early projects, limited partner enablement expenditure, no full local structure, and a disciplined focus on higher-fit account archetypes. The actual business case would be calibrated to the client's pricing, service model, margin profile, and sales cycle.

EXECUTIVE PERSPECTIVE

The largest execution risks can be mitigated through contract design, governance, and a narrow initial scope.

The risk agenda should be managed as part of the entry plan, not after the commercial launch begins.

EXHIBIT 6

Entry risk is manageable when each risk has an owner, a trigger, and a mitigation action

Illustrative risk assessment.

	Probability	Impact	Mitigation readiness
Partner underperformance	3	4	3
Weak demand conversion	3	4	3
Service delivery gaps	3	5	2
FX / payment exposure	3	3	4
Regulatory delay	2	3	3

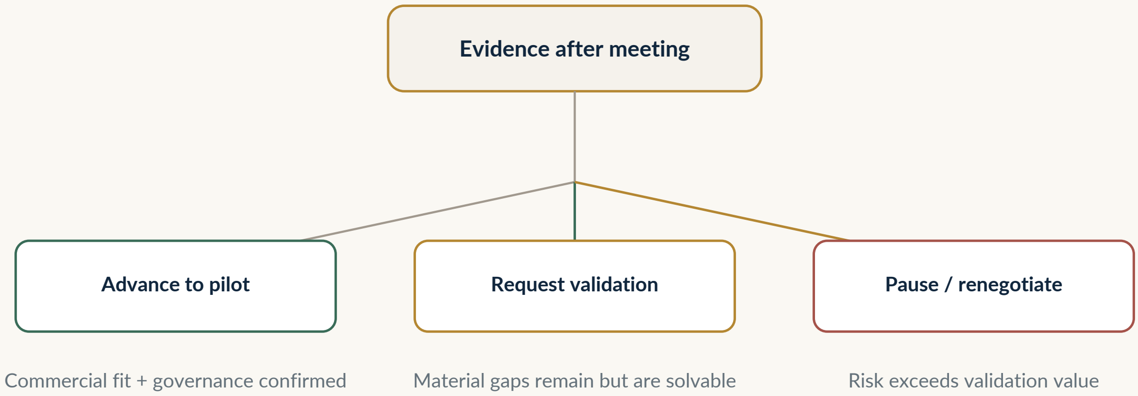
STRATEGIC IMPLICATION

The company should be willing to slow geographic ambition if the partner and service model do not produce evidence consistent with the desired customer experience.

EXECUTIVE PERSPECTIVE

The market-entry program should advance only as evidence confirms that the commercial thesis and operating model can reinforce each other.

The decision gates below translate that principle into a practical management rhythm.



EXECUTIVE RECOMMENDATION

Approve a 90-day Uruguay entry program: focus on a defined segment, activate a non-exclusive partner pilot, retain account and service governance, and build Brazil readiness in parallel. Do not approve a dedicated local structure or exclusive territory until the Day 90 evidence review.

EXECUTIVE PERSPECTIVE

The next working session should convert the entry architecture into owned actions, named accounts, and a formal governance calendar.

The advisory role is to preserve the integrity of the decision framework while the client moves into execution.

PRIORITY ACTIONS FOR THE WORKING SESSION

- Confirm the target segment, account archetypes, and first named-account list.
- Approve partner selection criteria and the pilot governance package.
- Define the commercial and technical evidence required at Days 30, 60, and 90.

STRATEGIC IMPLICATION

A market-entry plan is a management instrument: it should continue to change as new evidence appears, while preserving clarity on who decides what and when.

EXECUTIVE PERSPECTIVE

Methodology and illustrative assumptions

This sample is intentionally fictional and demonstrates how the advisory translates a market-entry question into a sequence of evidence-led decisions.

METHODOLOGY

The entry architecture integrates market attractiveness, commercial fit, route-to-market feasibility, operating readiness, scenario analysis, and governance. The emphasis is on designing an entry sequence that increases commitment only after the client has acquired relevant evidence.

ILLUSTRATIVE USE ONLY

All markets, scores, scenarios, financial values, and action plans in this document are illustrative. A client engagement would use verified information, stakeholder input, country-specific regulation, operational analysis, and a client-approved decision framework.

PARTNER ASSESSMENT

Operational Due Diligence

A structured operating and commercial assessment of a potential partner before committing resources, territory, or reputation.

CLIENT / CONTEXT

Empresa Exemplo | Mobility & Infrastructure

OBJECT	COUNTRY	LEVEL
Potential commercial partner	Argentina	Confidential

Partner selection should test the ability to execute, not only the ability to present a compelling commercial story.

EXECUTIVE PERSPECTIVE

The partner has commercial relevance, but advancement should be conditional on financial, technical, and governance validation.

The recommendation is not to reject the relationship; it is to turn uncertainty into specific conditions for progress.

ARTICLE AT A GLANCE

The partner's market relationships appear relevant to the target segment.

Technical capacity is adequate for a pilot but insufficiently documented for broader rollout.

Financial resilience requires validation through documentation and references.

Governance must be formalized before any exclusive commitment.

Decision required

Proceed with a conditional pilot subject to a documented validation plan and bilateral governance obligations.

WHY THIS MATTERS NOW

The commercial upside is attractive, but current evidence does not yet justify unrestricted reliance on the partner.

EXECUTIVE RECOMMENDATION

Set conditions precedent, require operating evidence, and preserve alternative-channel optionality.

KEY RISK

The company could mistake relationship access for repeatable operating capability.

Illustrative analysis. Values and scenarios are solely intended to demonstrate the advisory methodology.

EXECUTIVE PERSPECTIVE

The partner is commercially relevant, but the evidence currently supports a conditional pilot rather than a full strategic commitment.

The assessment distinguishes relationship access from repeatable capability.

EXECUTIVE CONCLUSION

The prospective partner appears to have meaningful local relationships and a plausible commercial fit with the client's target segment. However, the available evidence on financial resilience, technical service capacity, and governance maturity is incomplete. The recommended path is to proceed with a limited pilot subject to explicit validation conditions and an alternative-channel fallback.

Strength	Current evidence	Gap / condition
Local relationships	Relevant contacts in target segment	Validate decision-maker access
Commercial motivation	Strong interest in pilot economics	Confirm sales process discipline
Technical capacity	Basic service capability reported	Verify resources and response model
Financial resilience	Limited documentation available	Obtain financial and reference checks

EXECUTIVE PERSPECTIVE

The profile indicates a credible commercial story, but the operating history must be validated through documents, references, and observed execution.

Due diligence should test what the partner can repeatedly deliver, not only what it can describe.

Market presence

Operating in the target country with relevant sector contacts.

Validation: Validate named customer references and active pipeline.

Commercial reach

Potential access to accounts that fit the client's profile.

Validation: Confirm who owns relationships and decision pathways.

Technical delivery

Basic technical resources reported.

Validation: Test availability, certification, and escalation capability.

Governance

Entrepreneurial decision speed.

Validation: Confirm reporting discipline and contractual maturity.

EXECUTIVE PERSPECTIVE

The scorecard shows commercial fit, but it also highlights governance and technical-service gaps that must be addressed before any broader commitment.

The assessment should be read as a decision aid, not a rating of the relationship.

EXHIBIT 1

Capability scorecard supports a conditional pilot rather than unrestricted reliance

Score: 1 = weak; 5 = strong. Illustrative assessment.

Criterion	Partner score
Commercial fit	4
Market access	4
Technical capacity	3
Financial resilience	2
Governance maturity	2
Reputation / references	3
Strategic alignment	4

STRATEGIC IMPLICATION

The commercial case is sufficient to test, but it is not sufficient to grant exclusivity or rely on the partner for unrestricted technical delivery.

EXECUTIVE PERSPECTIVE

The risk profile is acceptable only if the client converts each uncertainty into a visible validation and mitigation action.

The purpose of the risk assessment is to make conditions for progress explicit.

EXHIBIT 2

Risk mitigation should be designed into the pilot agreement, not managed informally

Illustrative risk assessment.

	Probability	Impact	Mitigation readiness
Financial capacity	3	4	2
Technical delivery	3	4	3
Client relationship ownership	2	4	3
Reporting discipline	3	3	2
Reputational exposure	2	4	3

Risk	Mitigation	Owner	Timing
Financial resilience	Documentation and reference checks	Client finance	Pre-pilot
Technical capacity	Service-resource review	Client operations	Pre-pilot
Governance	Monthly reporting and review rights	Both parties	Pilot
Channel dependence	Maintain alternative contact pathways	Client commercial	Pilot

EXECUTIVE PERSPECTIVE

The partner should be asked to provide evidence that makes its operating claims testable.

A concise validation package is more valuable than a broad narrative of capability.

REQUIRED VALIDATIONS

CORPORATE AND FINANCIAL

Corporate registration, ownership confirmation, basic financial documents, and payment references.

COMMERCIAL

Named customer references, active pipeline evidence, and account coverage logic.

TECHNICAL

Resource list, certifications if relevant, service coverage, response model, and escalation path.

GOVERNANCE

Reporting template, decision authority, contracting process, and conflict-of-interest disclosures.

EXECUTIVE PERSPECTIVE

The right governance model should protect the client’s market access while giving the partner a credible path to earn deeper commitment.

Governance is the mechanism that turns a pilot into a decision-making process.

Governance element	Recommended design	Why it matters
Pilot term	90 days; non-exclusive	Creates a real test without territorial dependency
Account visibility	Shared account register	Protects customer intelligence and follow-up
Service standard	Named technical owners + escalation	Makes delivery responsibilities visible
Review rhythm	Weekly operational; Day 30/90 executive	Supports rapid correction and decision gates
Exclusivity	Only after evidence-based review	Preserves optionality

STRATEGIC IMPLICATION

The partner should not be asked to prove everything before starting. It should be asked to prove the few capabilities that determine whether the client can responsibly increase commitment.

EXECUTIVE PERSPECTIVE

The recommended decision is to proceed with conditions: test the partnership while preserving optionality and demanding evidence.

This conclusion protects commercial upside without ignoring operating uncertainty.

Proceed	Only after all validations are complete.
Proceed with conditions	Recommended: 90-day pilot and validation plan.
Pause	Use if core evidence cannot be provided.
Do not recommend	Use if material risk is confirmed.

STRATEGIC IMPLICATION

Proceed with a conditional, non-exclusive pilot; require a validation pack; monitor execution; and retain alternative channel options until evidence supports deeper commitment.

EXECUTIVE PERSPECTIVE

Next steps and sample methodology

This sample shows how an operational due diligence converts a relationship opportunity into a structured decision about risk, conditions, and governance.

NEXT STEPS

- Issue validation request and assign client owners for financial, technical, and commercial review.
- Schedule reference conversations and establish the minimum operating evidence required before pilot activation.
- Draft a pilot governance pack, including account visibility, reporting, service standards, and review dates.
- Hold an executive decision meeting once the validation pack has been reviewed.

All scores and examples in this document are illustrative. A client due diligence would be based on verified documentation, references, legal context, commercial information, and operating evidence.