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Go-to-Market strategies and regional expansion: creating new service segments for mid-sized companies

Estratégias de Go-to-Market e expansão regional: a criação de novos segmentos de atendimento para empresas de médio porte

Estrategias de Go-to-Market y expansión regional: creación de nuevos segmentos de atención para empresas medianas

JONATAN MOREIRA
E-mail: jonatan.more@gmail.com
Bacharelado em Administração de Empresas e Gestão
FCJ – Joinville, Joinville – Santa Catarina, Brasil
e
MBA Executivo em Finanças e Controladoria
INPG Business School, Joinville – Santa Catarina, Brasil

Abstract: This article aims to analyze, from a technical and scientific perspective, Go-to-Market (GTM) strategies applied to regional expansion processes, with emphasis on the creation of new service segments aimed at mid-sized companies (mid-market). The study starts from the observation that the mid-market segment occupies an intermediate position that is underexplored by strategic marketing literature, positioned between mass-market coverage models designed for small businesses and key account management models designed for large corporations. This qualitative, exploratory and descriptive research is grounded in a systematic literature review of reference authors in competitive strategy, marketing and innovation, articulated with an original conceptual model for structuring service segments. The article discusses the main segmentation frameworks, regional expansion maturity models, commercial coverage archetypes (direct, indirect, hybrid and partner-based) and the critical success factors for creating dedicated service structures for mid-sized companies. As a central contribution, a five-phase implementation roadmap is proposed, linked to performance indicators and governance mechanisms, applicable to organizations seeking to expand their geographic footprint and build differentiated value propositions for mid-market clients. The results indicate that creating specific service segments for the mid-market, when anchored in firmographic, behavioral and revenue-potential criteria, tends to produce commercial efficiency gains, reduced customer acquisition costs and greater predictability of recurring revenue, provided it is accompanied by investment in team training, decision-support technology and channel governance.

Keywords: Go-to-Market. Regional Expansion. Market Segmentation. Mid-sized Companies. Commercial Strategy.

Resumo: Este artigo tem como objetivo analisar, sob uma perspectiva técnica e científica, as estratégias de Go-to-Market (GTM) aplicadas a processos de expansão regional, com ênfase na criação de novos segmentos de atendimento voltados a empresas de médio porte (mid-market). Parte-se da constatação de que o segmento mid-market ocupa uma posição intermediária pouco explorada pela literatura de marketing estratégico, situada entre os modelos de atendimento massificado destinados a pequenas empresas e os modelos de contas-chave (key account management) voltados a grandes corporações. A pesquisa, de natureza qualitativa, exploratória e descritiva, fundamenta-se em revisão bibliográfica sistemática de autores de referência em estratégia competitiva, marketing e inovação, articulada a um modelo conceitual próprio de estruturação de segmentos de atendimento. Discutem-se os principais frameworks de segmentação, os modelos de maturidade de expansão regional, os arquétipos de cobertura

comercial (direto, indireto, híbrido e baseado em parceiros) e os fatores críticos de sucesso na criação de estruturas de atendimento dedicadas ao médio porte. Como contribuição central, propõe-se um modelo de roadmap de implementação em cinco fases, articulado a indicadores de desempenho e a mecanismos de governança, aplicável a organizações que buscam expandir sua atuação geográfica e criar propostas de valor diferenciadas para clientes de médio porte. Os resultados indicam que a criação de segmentos de atendimento específicos para o mid-market, quando ancorada em critérios firmográficos, comportamentais e de potencial de receita, tende a produzir ganhos de eficiência comercial, redução do custo de aquisição de clientes e maior previsibilidade de receita recorrente, desde que acompanhada de investimentos em capacitação de equipes, tecnologia de suporte à decisão e governança de canais.

Palavras-chave: Go-to-Market. Expansão Regional. Segmentação de Mercado. Médias Empresas. Estratégia Comercial.

Resumen: Este artículo tiene como objetivo analizar, desde una perspectiva técnica y científica, las estrategias de Go-to-Market (GTM) aplicadas a procesos de expansión regional, con énfasis en la creación de nuevos segmentos de atención dirigidos a empresas medianas (mid-market). El estudio parte de la constatación de que el segmento mid-market ocupa una posición intermedia poco explorada por la literatura de marketing estratégico, situada entre los modelos de atención masiva destinados a pequeñas empresas y los modelos de gestión de cuentas clave dirigidos a grandes corporaciones. Esta investigación cualitativa, exploratoria y descriptiva se fundamenta en una revisión bibliográfica sistemática de autores de referencia en estrategia competitiva, marketing e innovación, articulada con un modelo conceptual propio para estructurar segmentos de atención. Se analizan los principales marcos de segmentación, los modelos de madurez de la expansión regional, los arquetipos de cobertura comercial (directo, indirecto, híbrido y basado en socios) y los factores críticos de éxito para crear estructuras de atención dedicadas a empresas medianas. Como contribución central, se propone una hoja de ruta de implementación en cinco fases, vinculada a indicadores de desempeño y mecanismos de gobernanza, aplicable a organizaciones que buscan ampliar su presencia geográfica y desarrollar propuestas de valor diferenciadas para clientes del mid-market. Los resultados indican que la creación de segmentos de atención específicos para el mid-market, cuando se basa en criterios firmográficos, conductuales y de potencial de ingresos, tiende a generar mejoras de eficiencia comercial, reducción del costo de adquisición de clientes y mayor previsibilidad de ingresos recurrentes, siempre que vaya acompañada de inversiones en capacitación de equipos, tecnología de apoyo a la toma de decisiones y gobernanza de canales.

Palabras clave: Go-to-Market. Expansión regional. Segmentación de mercados. Empresas medianas. Estrategia comercial.

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1 Introduction

The growth of an organization beyond its original markets is one of the most studied strategic movements in the literature of administration, marketing and competitive strategy. Historically, business expansion models have focused on two extremes of the customer spectrum: on the one hand, mass-service, transactional and low-cost, small-business and end-consumer strategies; on the other, consultative and highly customized service strategies, targeted at large corporations, often structured under the key account management (KAM) logic. Between these two extremes is a set of companies - usually classified as medium-sized, or mid-market - whose business needs, operational complexity, and revenue potential do not fit appropriately for either of the two traditional models.

The medium-sized segment has hybrid characteristics: it has more formalized decision-making processes than small companies, but less bureaucratic than those of large corporations; it demands customized solutions, but with shorter sales cycles than key accounts; and, often, it is on an accelerated growth trajectory, which makes its commercial attractiveness high, although accompanied by greater volatility and credit risk. Despite this relevance, much of the Go-to-Market (GTM) literature treats the mid-market as a residual category, subordinated to the models designed for small or large companies, which results, in business practice, inadequate service structures, inefficient allocation of commercial resources and loss of revenue opportunities.

This article starts from the premise that regional expansion - understood as the process of expanding the commercial presence of an organization to new geographic markets, whether they are regions of the same country or new countries - constitutes a privileged strategic moment for the creation of segments of service dedicated to the mid-market. This is because the entry into new geographic markets requires, by definition, the reconfiguration of commercial coverage models, the redefinition of customer profiles (ideal customer profile) and the structuring of distribution and service channels, conditions that favor the introduction of more sophisticated segmentations than those practiced in mature markets.

The general objective of this work is to analyze, in a technical and scientific way, the Go-to-Market strategies applicable to regional expansion processes aimed at creating new service segments for medium-sized companies. More specifically, we seek: (i) to systematize the main theoretical frameworks of market segmentation and GTM strategy applicable to the context of the mid-market; (ii) to identify the commercial coverage archetypes and their applicability criteria; (iii) to propose an implementation roadmap model for the creation of dedicated service segments, associated with performance indicators; and (iv) discuss the critical success factors and the risks associated with this type.

The relevance of the subject is justified in at least three dimensions. From an academic point of view, the article contributes to fill a gap in the strategic marketing literature, which tends to treat segmentation by size of company in a generic way, without deepening the specificities of the mid-market in contexts of geographical expansion. From a managerial point of view, the work offers a conceptual model applicable by organizations that plan or execute regional expansion processes, assisting in decision making on organizational design, commercial resource allocation and investment prioritization. From an economic point of view, the strengthening of appropriate service strategies to the mid-market tends to favor the competitiveness of this business segment, recognizedly relevant for the generation of employment, income and innovation in different economies.

The article is structured in six sections in addition to this introduction. The second section presents the theoretical framework, addressing the fundamental concepts of Go-to-Market, market segmentation, the positioning of the mid-market in the literature and the regional expansion models. The third section describes the methodological procedures adopted. The fourth section develops the technical analysis itself, including the diagnosis of the mid-market, the commercial coverage archetypes, the model of structuring of service segments and the proposed implementation roadmap, illustrated by a hypothetical case study of a didactic character. The fifth section discusses the findings in light of the revised literature. Finally, the

sixth section presents the final considerations, study limitations and suggestions for future research.

2 Theoretical framework

2.1 Go-to-Market: conceptual foundations

The Go-to-Market (GTM) concept refers to the articulated set of strategic and operational decisions an organization adopts to bring a value proposition - product, service, or solution - to its target customers in order to generate demand, convert business opportunities, and sustain profitable relationships over time. Although the term has become popular mainly in the context of technology and software-as-a-service (SaaS) companies, its conceptual origin goes back to classic strategic marketing formulations, particularly to the concepts of segmentation, target market definition (targeting) and positioning, consolidated by Kotler and Keller in their approach to the strategic marketing process (STP - Segmentation, Targeting, Positioning). A comprehensive GTM strategy typically articulates five interrelated dimensions: (i) definition of the target market and the ideal customer profile; (ii) value proposition and competitive positioning; (iii) pricing and monetization model; (iv) commercial coverage model and distribution channels; and (v) organizational structure and sales and after-sale support processes. Porter's competitive strategy literature offers relevant foundations for understanding the third and fourth dimensions, in that the choice of a commercial coverage model is intrinsically related to generic leadership strategies in cost, differentiation or focus, each of them implying distinct arrangements of channels, cost structure and value proposition. In addition, the theory of the diffusion of innovations, developed by Rogers and later adapted to the context of technological marketing by Moore in his discussion about the crossing of the abyss between initial adopters and initial majority, offers a second conceptual pillar relevant to GTM strategies, especially when applied to the introduction of new solutions in markets or segments not yet consolidated - as usually occurs in the regional expansion focused on the mid-market, in which the solution can be mature in the market of origin, but still little known in the market.

From an organizational point of view, relationship marketing and key account management literature, associated with authors such as Treacy and Wiersema, contributes to understanding how different value disciplines - operational excellence, product leadership, or

customer intimacy - guide distinct call model choices. Companies that compete for intimacy with the customer tend to adopt more consultative and higher relationship intensity coverage models, while companies oriented to operational excellence tend to privilege more standardized and scalable service models. This distinction is particularly relevant for the design of medium-sized service segments, whose balance between standardization and customization constitutes, as will be discussed below, one of the main strategic challenges.

2.2 Market segmentation and the definition of mid-sized companies

Market segmentation is an analytical process by which an organization divides a heterogeneous market into subsets of relatively homogeneous customers among themselves, with the purpose of more efficiently directing their marketing and sales efforts. In the field of business-to-business (B2B) marketing, segmentation traditionally combines firmographic criteria - size, sector of activity, geographic location, corporate structure - with behavioral and needy criteria such as digital maturity, complexity of the decision-making process, price sensitivity and propensity to the adoption of new technologies.

The classification of companies by size, although widely used, lacks international standardization. Different government agencies, financial institutions and multilateral bodies adopt distinct criteria - annual turnover, number of employees, total assets - to define the boundaries between micro, small, medium and large enterprise. For the purposes of this article, a medium-sized functional definition (mid-market) is adopted, understood as the set of organizations that have already overcome the typical challenges of initial survival and have minimally structured administrative processes, but that have not yet reached the scale, organizational complexity and bargaining power characteristic of large corporations. This functional definition privileges behavioral and structural criteria to the detriment of rigid numerical thresholds, as it recognizes that such thresholds vary substantially between economic sectors and regional contexts.

A second relevant axis of the segmentation literature refers to the distinction between a priori segmentation and posteriori segmentation. A priori segmentation defines segments based on previously established variables - suchairs or sector - while a posteriori segmentation identifies customer groupings from behavioral and transactional data analysis, often with the support of clustering statistical techniques. In the context of creating new customer service segments for the mid-market, it is argued, in this article, by the combination of both approaches: a priori segmentation provides operational criteria for the initial allocation of commercial

resources, while a posteriori segmentation allows the continuous refinement of eligibility and prioritization criteria as the organization accumulates data on the behavior of its mid-size customers in the new geographic market.

Finally, it is worth highlighting the ideal customer profile (ICP), widely used in contemporary literature and GTM practice, which describes the set of characteristics that define customers most likely to obtain value from the organization's proposal and, reciprocally, to generate sustainable value for it. The definition of a specific ICP for the medium-sized segment in a new regional market constitutes a central methodological stage of the model proposed in this article, in that it guides both the criteria of lead qualification and the design of the value proposition and the service structure.

2.3 Regional expansion: models and strategies

Regional expansion can be understood as a particular case of business growth strategy, being located, in the classic Ansoff matrix, among market development strategies - when the organization takes existing products or services to new geographic markets or customer segments - and, in situations of greater complexity, diversification strategies, when geographical expansion is accompanied by substantial adaptations in the value proposition. The internationalization literature of companies, represented by models such as Uppsala, describes the expansion to new markets as a gradual process, characterized by successive increments of resource commitment as the organization accumulates experiential knowledge about the new market.

Although the Uppsala model was originally formulated to explain internationalization processes between countries, its principles are applicable, with the appropriate adaptations, to processes of regional expansion within the same country, especially in economies of great territorial extent and regional socioeconomic heterogeneity, in which differences in business culture, infrastructure, local regulation and market maturity between regions can be as significant as the differences observed in internationalization processes proper. A second theoretical body relevant to the understanding of regional expansion is that of dynamic capabilities, developed by Teece and collaborators, which emphasizes the organizational capacity to perceive opportunities (sensing), apprehend these opportunities through the reconfiguration of resources (seizing) and continuously transform the organization (transforming) as determining factors of success in changing environments. Applied to the context of regional expansion, this framework suggests that success depends not only on the

quality of initial planning, but on the organization's ability to continuously adjust its service model as new information about the target market is obtained.

From the operational point of view, the channel strategy literature identifies three main archetypes of commercial coverage applicable to expansion processes: (i) the direct model, in which the organization employs its own sales force in the new market; (ii) the indirect model, in which expansion occurs through channel partners, distributors or local dealers; and (iii) the hybrid model, which combines elements of the previous two, often segmenting the customer base by criteria of size, and which will be applied. The choice between these archetypes involves a typical trade-offs between control, expansion speed, required initial investment and local knowledge, being particularly relevant for the design of medium-sized service segments, whose volume of accounts tends to be high enough to justify more scalable models than those employed in serving large accounts, but whose complexity of needs tends to exceed that of purely transactional models.

2.4 The mid-market in commercial strategy literature

The literature specialized in commercial strategy for the mid-market, although less consolidated than the literature focused on small companies or large corporations, has consistently pointed to a set of distinctive characteristics of this segment that justify specific strategic treatment. Firstly, medium-sized companies tend to present greater internal heterogeneity than traditional firmographic criteria suggest: two companies with similar annual turnover may present radically distinct levels of digital maturity, sophistication of purchasing processes and willingness to adopt new solutions, which requires segmentation models that combine size criteria with behavioral criteria.

Second, the purchasing decision-making process in midsize companies often involves an intermediate number of decision-makers - typically between three and seven individuals, according to B2B purchasing behavior studies - which requires business approaches that address multiple stakeholders without incurring the costs and duration of sales cycles typical of large corporate accounts, which can involve dozens of decision-makers and formal procurement processes.

Third, medium-sized companies often find themselves in growth trajectories that change their needs relatively quickly, which imposes on suppliers the challenge of designing value propositions and business models capable of keeping up with this evolution, under penalty of under-service - when the solution offered is insufficient for the customer's growing needs - or

oversizing - when the complexity and cost of the solution exceeds the customer's absorption capacity. This phenomenon is discussed in the innovation literature from the perspective of "value trap", a situation in which suppliers optimized to serve large accounts tend to offer overly complex and expensive solutions for the mid-market, while suppliers optimized for small businesses tend to offer insufficiently robust solutions.

Finally, the channel management and commercial efficiency literature highlights that the cost of customer acquisition (CAC) and the value of the customer's lifetime life (CVL) in the midsize segment are often more favorable than that observed in both small companies - whose CLV tends to be low and the turnover rate (churn) high - and in large accounts - whose CAC tends to be high due to long sales cycles. This more favorable relationship between CAC and CLV is one of the main economic arguments for the creation of service segments dedicated to the mid-market, especially in contexts of regional expansion, in which the organization is still building its initial customer base and its reputation in the new market.

3 Methodology

This article adopts a qualitative approach, exploratory and descriptive, oriented to theoretical systematization and the proposition of a conceptual model applicable to management practice. The choice for a qualitative approach is justified by the very nature of the research problem, which involves the articulation of theoretical constructs - Go-to-Market, market segmentation, regional expansion - whose in-depth understanding requires interpretive and integrative analysis, to the detriment of statistical measurement of causal relations, which would require access to primary data from organizations in the process of regional expansion, not available in the scope of this work.

The central methodological procedure adopted was the systematic and integrative literature review, with literature survey in three main thematic axes: (i) competitive strategy and strategic marketing, including classic and contemporary authors from the areas of segmentation, positioning and value proposition; (ii) strategy of expansion and internationalization of companies, including models of organizational growth and dynamic capabilities; and (iii) applied literature of Go-to-Market and commercial management B2B, including formulations on customer profile. The review favored reference works widely cited in the literature of administration and strategic marketing, complemented by consolidated formulations of the practice of contemporary commercial management.

From the literature review, we proceeded to the integrative analysis of the identified constructs, with the objective of constructing an original conceptual model - presented in the fourth section of this article - capable of guiding the creation of segments of service dedicated to the mid-market in contexts of regional expansion. The development of the model followed deductive-constructive logic, based on the general theoretical principles identified in the literature review for the formulation of an applicable implementation roadmap, structured in sequential phases and articulated to performance indicators.

For the purpose of illustration and logical validation of the proposed model, a hypothetical and didactic case study was developed, constructed from the synthesis of recurrent patterns observed in the consulted literature and in consolidated reports of market practices, without direct correspondence to any specific organization. The hypothetical case has an exclusively illustrative function, not setting up empirical research, and its quantitative data - when presented - have a merely exemplifying character, aimed at facilitating the understanding of the practical application of the proposed conceptual model.

It is recognized, as a central methodological limitation, the absence of empirical validation of the proposed model through real case studies, field research or quantitative methods, which is pointed out, in the sixth section of this article, as a relevant agenda for future research. Still, it is understood that the theoretical systematization performed and the proposition of an integrative conceptual model constitute a relevant scientific contribution, in that they organize, in a coherent and applicable way, a set of constructs previously treated in a fragmented way by the literature.

4 Development and analysis

4.1 Diagnosing the mid-market in a regional expansion context

The construction of effective Go-to-Market strategies for the mid-market, in contexts of regional expansion, presupposes an initial diagnosis that properly characterizes the segment in the specific target market, since - as discussed in the literature review - the characteristics of the mid-market can vary substantially between regions, sectors and stages of economic development. For this diagnosis, it is proposed the articulated analysis of four dimensions: firmographic dimension, behavioral dimension, competitive dimension and regulatory-institutional dimension.

The firmographic dimension comprises the survey of structural data on the population of medium-sized companies in the target market, including sector distribution, geographical distribution within the region, turnover and number of employees, and predominant corporate structure - family businesses, companies with participation of investment funds, smaller publicly traded companies, among others. This survey allows you to scale the addressable market size (TAM) specific to the mid-size segment in the new region, as well as identify sectoral or geographic concentrations that can guide the initial prioritization of commercial efforts.

The behavioral dimension refers to the survey of digital maturity patterns, purchasing processes, preferential information channels and propensity to adopt new solutions among medium-sized companies in the target market. Unlike the firmographic dimension, of a predominantly structural nature, the behavioral dimension ideally requires direct contact with potential customers - through exploratory interviews, market research or analysis of secondary data of digital behavior - in order to avoid the uncritical transposition of behavioral patterns observed in the organization’s home market to the new geographic market, a practice that constitutes one of the most recurrent errors in unsuccessful regional expansion processes.

The competitive dimension comprises the mapping of competitors already established in the medium-sized service in the target region, including direct competitors - which offer similar value propositions - and indirect competitors, such as internal solutions developed by the target companies themselves or manual processes not yet digitized that fulfill a function equivalent to that of the offered solution. Competitive analysis should consider not only the intensity of the competition, but also the commercial coverage models predominantly used by established competitors, since such models often reflect adaptations already made to the local particularities of the mid-market.

Finally, the regulatory-institutional dimension comprises the survey of legal, tax and regulatory particularities that may affect both the operation of medium-sized companies in the target region and the very model of attendance to be adopted by the expanding organization - for example, requirements of local legal presence, specific sectoral regulations or public procurement particularities, where applicable. This dimension is particularly relevant in processes of international expansion, but should not be disregarded in processes of regional expansion within the same country, especially in federal contexts in which different subnational units may present distinct tax or regulatory regimes.

4.2 Commercial coverage archetypes

Based on the diagnosis of the mid-market in the target market, the organization must select the commercial coverage archetype best suited to the creation of the new service segment. This article proposes the systematization of four main archetypes, each associated with different levels of investment, control, speed of expansion and adaptation to different competitive contexts.

The first archetype, called dedicated direct coverage, involves the creation of its own commercial structure - salespeople, technical experts and customer success professionals - specifically dedicated to midsize service in the new region. This archetype offers the highest degree of control over the customer experience and the quality of commercial execution, being particularly adequate when the value proposition requires a high degree of customization or specialized consulting, when the target market has sufficient revenue potential to justify the initial investment in its own structure, and when the organization already has recruitment processes, training and commercial management sufficiently mature to be replicated in the new region. Its main risk lies in the time and investment required to achieve adequate commercial productivity, especially when the organization lacks consolidated prior knowledge about the target market.

The second archetype, indirect coverage via channel partners, involves expansion through distributors, dealers or local integrators already established in the medium-sized service in the target region. This archetype allows a speed of expansion higher than the direct model, lower initial investment and use of local knowledge and the relationship base already constituted by the partner, being especially adequate in markets in which the organization does not have sufficient prior knowledge or in which regulatory or cultural barriers make the direct presence excessively costly or risky. Its main risks include less control over the customer experience, potential dilution of the original value proposition, and dependence on the quality and commitment of the selected partner, which requires robust channel governance mechanisms, including clear selection criteria, capacity building, incentives, and performance tracking. The third archetype, segmented hybrid coverage, combines elements of the two previous archetypes, typically allocating different mid-market sub-segments to different coverage models as a function of criteria such as revenue potential, complexity of the need or geographic location within the target region. For example, an organization may choose direct service to medium-sized companies of greater revenue potential or greater complexity, concentrated in urban centers of higher economic density, while employing channel partners

for the service of companies of lower individual potential or located in lower density squares, in which the cost of maintaining own structure would not be justified. This archetype tends to maximize market coverage and resource allocation efficiency, but requires greater management sophistication, since it involves the simultaneous operation of multiple commercial models.

The fourth archetype, low-touch/product-led digital coverage, is based on the acquisition and conversion of customers through digital channels, with minimal human intervention or limited to specific moments of the relationship - such as initial implementation or contractual renewal. This archetype has gained increasing relevance, especially in software-based solutions, and is particularly suitable for smaller sub-segments within the mid-market itself, or for early stages of regional expansion in which the organization seeks to validate the adequacy of its value proposition to the new market before investing in a more robust commercial structure. Its main risks lie in the lower ability to capture more complex needs and the reliance on mature digital infrastructure on the part of the target customer, which can be a relevant limitation in regional markets of lower digital maturity.

The choice between these four archetypes - or, more often, between specific combinations of them - should be guided by the weighting of factors such as addressable market size, local competitive intensity, the complexity of the value proposition, the digital maturity of the target market, and the availability of capital and organizational capacities for investment in one's own structure. The conceptual framework proposed in this article recommends that this choice be revisited periodically, as the organization accumulates knowledge about the target market, in line with the logic of dynamic capabilities discussed in the literature review.

4.3 Service segment structuring model

From the diagnosis of the mid-market and the selection of the commercial coverage archetype, it is proposed a model of structuring of the new service segment organized in four central components: definition of the regional ideal customer profile, design of the segmented value proposition, sizing and organizational design of the commercial structure, and definition of the governance model and performance indicators.

The definition of the ideal regional customer profile (ICP) for the mid-market should combine firmographic criteria - billing range, number of employees, sector of action - with behavioral criteria identified in the diagnostic phase, such as level of digital maturity, existence of formal purchase processes and presence of specific pains or needs that the organization's value proposition is able to address. It is also recommended to define explicit exclusion criteria

- that is, characteristics that, although present in certain medium-sized companies, indicate a low probability of success in the commercial relationship - in order to avoid the allocation of commercial resources to low-quality opportunities, a practice that constitutes one of the most frequent causes of inefficiency in commercial expansion processes.

The design of the segmented value proposition involves adapting - when necessary - the original value proposition of the organization to the specificities identified in the diagnosis of the regional mid-market, avoiding both the uncritical transposition of value propositions designed for large accounts, which tend to be excessively complex and expensive for the mid-market, and the transposition of value proposals designed for small companies, which tend to be insufficiently robust. This process should consider not only the functional attributes of the solution, but also the pricing model, which, in the case of the mid-market, tends to benefit from staggered structures, capable of accommodating customer growth over time without imposing abrupt cost discontinuities.

The sizing and organizational design of the commercial structure involve defining the number of professionals needed, the functions to be performed - business development, consultative sales, customer success, technical support - and the form of territorial or sectoral organization of the team. It is recommended that the initial sizing be conservative, anchored in explicit assumptions about expected commercial productivity, sales cycle and conversion rate, with periodic review mechanisms as actual performance data in the new market are obtained, avoiding both undersizing - which compromises the capacity to capture opportunities - and the oversizing - that compromises the cost efficiency in the early phase of expansion, characterized by high uncertainty.

Finally, the definition of the governance model and performance indicators involves the establishment of monitoring and decision-making mechanisms that allow the organization to continuously evaluate the adequacy of the service segment created, adjusting ICP assumptions, value proposition, coverage archetype and organizational sizing as necessary. This component is discussed in greater depth in the following subsection, dedicated to the performance indicators applicable to the proposed model.

4.4 Performance indicators

The effective management of a new medium-sized service segment, in a context of regional expansion, requires a system of indicators capable of capturing both short-term commercial efficiency and the medium and long-term strategic sustainability of the initiative.

It is proposed the organization of these indicators in four categories: acquisition indicators, efficiency indicators, retention and expansion indicators, and segment health indicators. Acquisition indicators include the volume of qualified-made leads and sales-made leads, the conversion rate of opportunities into customers, and the average sales cycle time. In the context of regional expansion, it is particularly relevant to monitor the evolution of these indicators over time, since it is expected, in accordance with the logic of dynamic capacities and organizational learning discussed in the literature review, that the acquisition efficiency progressively improves as the organization accumulates knowledge about the target market and refines its PCI criteria.

Efficiency indicators include the cost of customer acquisition (CAC), the CAC payback period - time required for the revenue generated by a customer to cover the cost of its acquisition - and productivity per sales professional, typically measured by the revenue generated by a seller in a given period. These indicators allow to evaluate whether the sizing and the commercial coverage archetype adopted are generating economic efficiency compatible with the assumptions of the expansion plan, constituting central input for investment adjustment decisions.

Retention and expansion indicators include the customer retention rate (or, conversely, the turnover rate - churn), the revenue retention rate, and the lifetime lifetime value (CLV). These indicators are particularly relevant for the medium-size segment, whose economic attractiveness, as discussed in the literature review, depends fundamentally on the favorable relationship between CAC and CLV; their systematic measurement allows to identify early eventual mismatches between the value proposition offered and the real needs of the segment, before such misfits compromise the economic viability of the expansion initiative. The segment's health indicators, finally, include qualitative and semi-quantitative metrics, such as customer satisfaction (measured, for example, through Net Promoter Score), the rate of adoption of functionalities or core services of the value proposition, and indicators of engagement in indirect coverage relationships, where applicable, such as the turnover generated by channel partner and the rate of certification and capacity building of the partner network. These indicators fulfill early warning function, allowing the organization to identify signs of deterioration of the adequacy of its service strategy before such signals manifest themselves more evidently in the financial indicators of acquisition, efficiency or retention. It is recommended that the monitoring of these indicators be carried out through a specific governance body - expansion committee or equivalent structure -, with a periodicity that becomes progressively less frequent as the initiative matures: weekly or fortnightly monitoring

in the first months of operation, evolving to monthly monitoring after the initial stabilization of commercial processes, and quarterly in stages of advanced maturity, when the service segment already operates in a consolidated and predictable way.

4.5 Five-phase implementation roadmap

Based on the components discussed in the previous subsections, it is proposed a structured implementation roadmap in five sequential phases, each associated with specific objectives, main deliverables and advance criteria for the subsequent phase. The model recognizes, in line with the literature of dynamic capabilities, that the progression between phases is not necessarily linear, and may involve returns to previous phases if the learning obtained indicates the need for review of fundamental assumptions.

The first phase, called diagnosis and thesis validation, aims to confirm the existence of sufficient market opportunity to justify the investment in a service segment dedicated to the mid-market in the target region. Its main deliverables include addressable market sizing, initial competitive mapping, and conducting exploratory interviews with potential customers, in order to validate initial hypotheses about purchasing needs and behavior. The forward criterion for the next phase is confirmation that the addressable market and local competitive intensity economically justify planned investment.

The second phase, design of the service model, corresponds to the definition of the regional ideal customer profile, the segmented value proposition, the commercial coverage archetype and the initial organizational sizing, as discussed in the previous subsections. Its main deliverable is a detailed business plan for the new service segment, including financial projections, hiring schedule and necessary investments in business decision support technology. The advancement criterion is the formal approval of this plan by the competent governance bodies of the organization.

The third phase, a controlled pilot, involves the implementation of the reduced-scale attendance model - typically restricted to a sub-region or a subset of the broader target market - with the aim of testing and refining the assumptions set out in the previous phase before committing full-scale investments. It is recommended that this phase has a predefined duration, between three and six months, depending on the complexity of the sales cycle identified in the diagnosis, and that it be accompanied by an indicator system as discussed in the previous subsection. The criterion of advancement is the achievement of minimum validation goals, previously defined, related to indicators of acquisition, efficiency and customer satisfaction.

The fourth phase, regional scale, corresponds to the expansion of the validated model in the pilot to the entire regional target market, including the full sizing of the commercial structure, the formalization of channel partnerships - where applicable - and the structuring of customer support, marketing and success processes at a scale compatible with the projected volume of customers. This phase is characterized by greater standardization of processes, in contrast to the exploratory character of the previous phases, and should be accompanied by corresponding investments in customer relationship management technology (CRM) and in systematic team training.

The fifth and final phase, consolidation and continuous optimization, corresponds to the stage of operational maturity of the service segment, characterized by stabilized and predictable processes, in which the organizational focus shifts from validation and initial construction to the incremental optimization of efficiency, the exploration of revenue expansion opportunities in existing customers and the eventual replication of the validated model for new regions or new mid-market sub-segments. This phase does not have, by definition, a criterion of advancement for a subsequent linear stage, but must be accompanied by periodic cycles of strategic review, capable of identifying the need for more substantial reformulations of the service model in response to relevant changes in the target market or in the competitive environment.

4.6 Illustrative case study

In order to illustrate the application of the proposed conceptual model, a case study of hypothetical and didactic character is presented in this subsection, constructed from the synthesis of recurrent patterns identified in the consulted literature, without correspondence to any real organization. The quantitative data presented have an exclusively exemplifying function.

Consider an organization providing business technology solutions, originally established and mature in a large metropolitan region, which plans to expand its commercial performance to a set of regions of lower economic density, but with a relevant concentration of medium-sized companies in sectors such as agro-industry, manufacturing and specialized services. Until then, the organization operated with two service models: a low-touch digital sales model, targeted at small businesses, and a highly advisory key account model, targeted at large corporations. The initial analysis of its customer portfolio revealed that medium-sized companies, when served by either of the two existing models, had lower than average business

performance - higher turnover rate when served by the low-touch digital model, because they perceived insufficient advisory support, and disproportionately long sales cycles when met by the key account model, due to the application of scaled business processes to much higher complexity accounts. In the first phase of the proposed roadmap, the organization conducted a diagnosis of the mid-market in the target regions, identifying a relevant addressable market, concentrated mainly in medium-sized manufacturing companies with moderately formalized purchasing processes, managed predominantly by family structures in the process of professionalization. The diagnosis also identified a limited competitive presence of suppliers specialized in serving this specific customer profile, setting up a favorable opportunity window for entry. In the second phase, the organization designed a specific regional ideal customer profile, combining billing criteria, sector of action and digital maturity indicators, and developed an intermediate value proposition between its two existing models - maintaining advisory support elements considered essential by the segment, but with a more agile and structured business process than the key account model. We opted for an archetype of hybrid coverage, with a direct structure dedicated to the squares with the highest addressable market concentration and partnership with a regional integrator already established for the other squares. In the third phase, the organization implemented a controlled pilot in one of the target regions, with reduced staff and intensive monitoring of indicators. At the end of the pilot period, defined in four months, the indicators of conversion and customer satisfaction reached the minimum levels established as a criterion of advancement, although the observed average sales cycle was higher than initially projected, leading to an adjustment in the assumptions of dimensioning the commercial structure for the next phase.

In the fourth phase, the organization expanded the validated model to all the target regions, formalizing the partnership with the regional integrator through a structured contract, including performance goals and joint training mechanisms, and expanding the direct structure dedicated in the most potential squares. In the fifth phase, already in the consolidation stage, the organization turned to the optimization of revenue expansion processes in existing customers, identifying cross-selling opportunities of additional modules of its solution, and began evaluation of the replicability of the model for new geographic regions with a socioeconomic profile similar to that of the regions initially served.

This illustrative case evidences, in a didactic way, how the conceptual model proposed in this article can guide, in a structured way, a process of regional expansion centered on the creation of a service segment dedicated to mid-market, articulating diagnosis, design,

validation, scale and consolidation in a sequential way, but subject to continuous adjustments based on accumulated organizational learning.

5 Discussion

The analysis developed in this article allows to resume, in an articulated way, the contributions of the revised literature and the proposed conceptual model, discussing its theoretical and practical implications. Firstly, the results reinforce the argument, already present in a dispersed way in the strategic marketing and commercial management literature, that the treatment of the mid-market as a residual category - subordinated to the models of care designed for small companies or for large accounts - tends to produce relevant commercial inefficiencies, either due to insufficient advisory support, or for excess complexity and cost. The systematization carried out in this article, by integrating segmentation frameworks, channel strategy and dynamic capabilities, contributes to consolidate a more specific theoretical treatment of this segment, responding to a gap identified in the introduction of the work.

Secondly, the proposition of the four commercial coverage archetypes - dedicated direct, indirect via partners, segmented hybrid and low-touch digital hybrid - offers an analytical instrument that articulates, in a practical way, choices often treated in isolation in the channel strategy literature. The discussion shows that the choice between these archetypes should not be understood as binary and definitive decision, but as a contingent choice, subject to review as the organization accumulates knowledge about the target market - an argument consistent with the perspective of dynamic capabilities of Teece and collaborators, which emphasizes the importance of the continuous reconfiguration of organizational resources in response to environmental changes.

Thirdly, the five-phase implementation roadmap, articulated to a system of performance indicators organized into four categories, offers a predominantly managerial contribution, in that it translates abstract theoretical constructs into an instrument applicable by organizations that plan or execute regional expansion processes. It should be noted, however, that the proposed roadmap does not intend to exhaust the real complexity of these processes, which involve, in business practice, additional variables - such as capital constraints, corporate governance dynamics and idiosyncratic factors of each organization and market - not fully captured by a conceptual model of general application.

Fourth, the illustrative case study, although hypothetical, evidences the plausibility of the practical application of the proposed model, by demonstrating how decisions related to

diagnosis, design of value proposition, choice of coverage archetype and organizational sizing can be articulated coherently throughout a regional expansion process. Still, it is recognized that the hypothetical nature of the case limits its capacity for empirical validation, but constitutes an exercise of logical applicability than a proof of the effectiveness of the model in a real context.

Finally, the discussion suggests that the creation of medium-sized service segments in regional expansion processes should not be understood only as an operational efficiency decision, but as a strategic decision capable of generating sustainable competitive advantage, in that the construction of specialized knowledge about the needs of this segment - and the organizational capacity to serve it in a differentiated way - constitutes a resource of difficult replication by competitors, in line with the perspective of the resource-based view.

6 Final considerations

This article aimed to analyze, in a technical and scientific way, the Go-to-Market strategies applicable to regional expansion processes aimed at the creation of new service segments for medium-sized companies. From a systematic literature review, articulating strategic marketing frameworks, expansion strategy and commercial management B2B, it was possible to systematize the main distinctive characteristics of the medium-sized segment, the commercial coverage archetypes applicable to regional expansion processes, and propose an original conceptual model of structuring of service segments, materialized in a five-phase implementation roadmap articulated to the performance indicator system.

The results of the analysis indicate that the treatment of the mid-market as a specific strategic category - and not as a residual extension of models designed for small companies or large corporations - tends to produce relevant benefits in terms of commercial efficiency, adequacy of the value proposition and economic sustainability of the customer relationship, especially when this structuring occurs in a deliberate and planned way, in line with the privileged strategic moment that regional expansion represents for the reconfiguration of organizational service models.

The article contributes to the literature of strategic marketing and commercial management by systematizing, in an integrated way, theoretical constructs often treated in a fragmented way, and by proposing a conceptual instrument applicable both to academic reflection and to managerial practice. From a managerial point of view, the proposed model offers managers and commercial strategy formulators a structured but flexible roadmap to guide

decisions related to market diagnosis, value proposition design, the choice of commercial coverage archetypes and organizational sizing in regional expansion processes aimed at mid-market.

However, relevant limitations of this study are recognized. The qualitative and theoretical nature of the research, anchored in a literature review and in a hypothetical case study of an illustrative character, does not allow the empirical validation of the proposed model, nor the measurement of its relative effectiveness compared to alternative approaches of commercial expansion. In addition, the medium-sized functional definition adopted in this article, although theoretically justified, does not replace the need to adapt the segmentation criteria to the sectoral and regional particularities of each application context.

As an agenda for future research, the following are suggested: (i) empirical case studies with real organizations undergoing regional expansion, capable of validating or refining the proposed conceptual model; (ii) quantitative studies capable of measuring the relationship between the adoption of service segments dedicated to the mid-market and commercial performance indicators, such as customer acquisition efficiency and retention; (iii) comparative research across different economic sectors to identify sector-specific characteristics not captured by the general model proposed in this article; and (iv) an in-depth analysis of channel governance mechanisms in hybrid and indirect coverage archetypes, a topic addressed here at a relatively general level but open to specific theoretical and empirical development. These contributions are expected to deepen academic and managerial understanding of the mid-market, a market segment whose economic relevance contrasts with the relative scarcity of specific theoretical treatment in commercial strategy and marketing literature.

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