

# Market Sizing: Sample Deliverables, Case Studies and PoV

Dec 19, 2025



# Agenda

- **Sample Deliverables**
- **Case Studies**
- **Consultant Profile**
- **Appendix – PoV on Market Sizing**

# Sample Deliverables

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# Sample deliverables – Market Sizing

Illustrative

## Market Sizing Summary

The WholesaleCo's GTM plan is focused on capturing the opportunity in the segment 1 of the XX Wholesaler market

2024 XX Market Size & WholesaleCo Share

Total 2024 Market Size<sup>1</sup>     WholesaleCo's 2024 Net Sales<sup>2</sup>

Parent Segment 1 \$XXB / \$XXM (12%)						Parent Segment 2 \$XXB / \$XXM (-1%)	
Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	Segment 6	Segment 7	Segment 8
Market Revenue \$XXB	\$XXM	\$XXM	\$XXB	\$XXM	\$XXM	\$XXB	\$XXM
WholesaleCo Revenue (% Share)	\$XXM (12%)	\$XXM (8%)	\$XXM (7%)	\$XXM (15%)	\$XXM (5%)	\$XXM (18%)	\$XXM (<1%)

Notes: Notes and Assumptions

## TAM to SAM

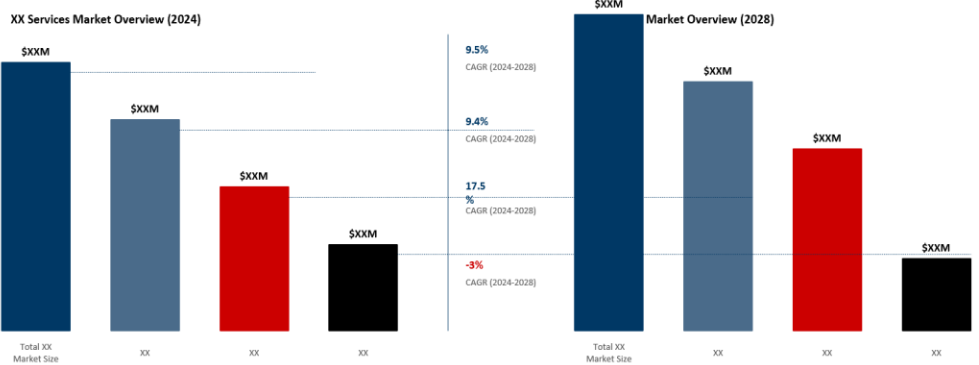
Estimated serviceable market 1 opportunity is ~\$XXM in incremental revenue (\$XXM GP) based on 2024 figures

To be captured over 5 years | Market 1 Incremental Opportunity

	① No relationship with Company 1 \$XXM (Count)	② Partial Relationship with Company 1 \$XXM (Count)	③ All Locations – Partial Relationship \$XXM (Count)	Key Assumptions/Methodology <sup>1</sup> • XX
Filter 1: Top 80% of Account by Revenue	\$XXM (Count)	\$XXM (Count) XX (Count) XX (Count)	\$XXM (Count) XX (Count) XX (Count)	
Filter 2: Excluded Others		Others \$XXM (Count)	Others \$XXM (Count)	
Filter 4: Assumed Capture	5% \$XXM	25% \$XXM	25% \$XXM	
Serviceable Rev Opportunity GP	\$XXM \$XXM	\$XXM \$XXM	\$XXM \$XXM	

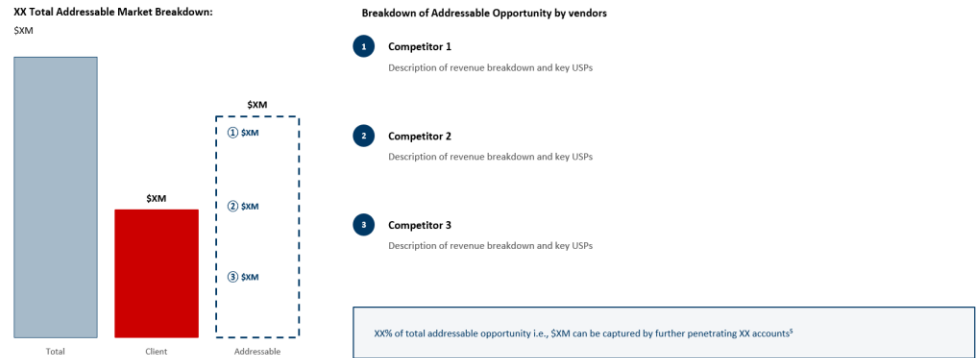
## Sizing and Forecasting

The XX Services Market is large and is growing, offering a unique opportunity to value in a high growth segment



## Market Share Summary

Client has ~XX% of the XX market, there is a growth opportunity of \$XM majorly driven by penetrating customers not currently managed by sales



# Sample deliverables – Market Sizing (Excel Models)

Illustrative

## Detailed coverage with Methodology, and assumptions

### Table of Contents

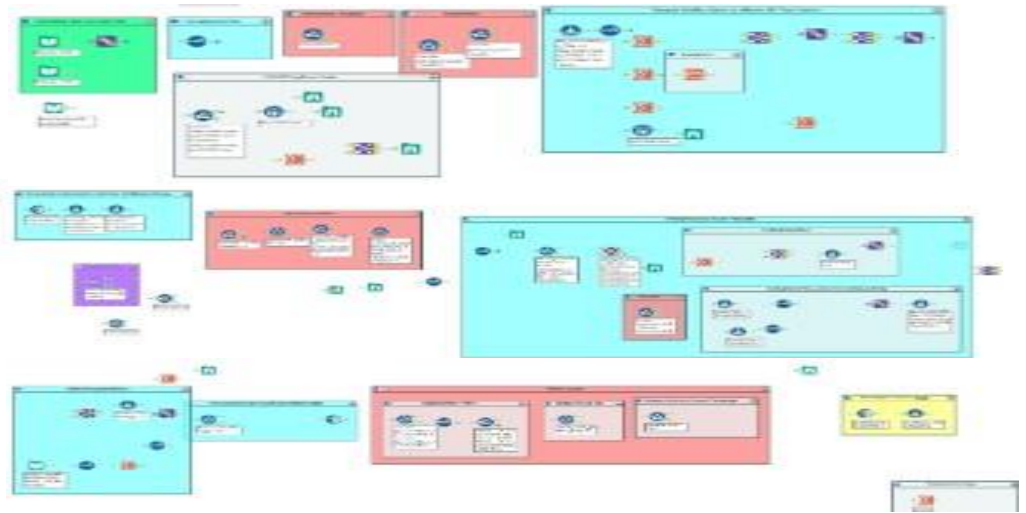
Page #	Page Name	Description
<b>1</b>	<b>Final Output</b>	
1.1	Pivot Table SAM Market Model	Pivot table - Total Serviceable market for Datacenter Services and Maintenance
1.2	Pivot Table TAM Market Model	Pivot table - Total Addressable market for Datacenter Services and Maintenance
<b>2</b>	<b>Methodology</b>	Description of market sizing methodology
<b>3</b>	<b>Outputs by Step</b>	
3.1	Step 1 - XX	Creating initial data cube with XX in the US
3.2	Step 2 - XX	Adding XX, XX
3.3	Step 3 - XX	Adding Size split and XX Market share to XX
3.4	Step 4 - XX	Updating standard XX based on theXX
3.5	Step 5 - XX	Convert XX to total service cost
3.6	Step 6 - XX	Added initial splits of Service category and contract type (these market share were updated in the next step to add variability b/w XX
3.7	Step 7 - XX	Updating Service Category and Contract Type market share based on the insights from Expert Interviews and discussion with client stakeholders
3.8	Step 8 - XX	Identified XX that is outside of client's SAM and excluded them from the model
<b>4</b>	<b>Sources and Assumptions</b>	Sources and assumptions used in the market sizing model
<b>5</b>	<b>Raw Data</b>	
5.1	Raw Data SAM Market Model	Final output of market sizing SAM (Raw Data)
5.2	Raw Data TAM Market Model	Final output of market sizing TAM (Raw Data)

## Pivot Table Based Detailed Excel Models

Country	(All)
Software Segment 1	(All)
Software Segment 2	(All)
Subscription Type	(All)
Vendor Name	(All)

Sum of USD \$	Year	2023	2024	2025	2026	2027	2028	Grand Total
DC Capacity - Infrastructure Buyer	Employee Size							
Enterprise Software	10,000+	\$113.6M	\$134.3M	\$144.4M	\$158.4M	\$172.7M	\$193.6M	\$917.1M
Enterprise Software	1,000-10,000	\$25.6M	\$29.9M	\$31.9M	\$34.6M	\$37.3M	\$41.4M	\$200.6M
Enterprise Software	100-1,000	\$9.1M	\$11.2M	\$12.6M	\$14.4M	\$16.5M	\$19.3M	\$83.2M
Enterprise Software	Less than 100	\$18.3M	\$21.7M	\$23.2M	\$25.4M	\$27.6M	\$30.8M	\$147.0M
Infrastructure Software	10,000+	\$66.5M	\$73.1M	\$92.6M	\$108.2M	\$124.2M	\$140.5M	\$605.2M
Infrastructure Software	1,000-10,000	\$12.7M	\$13.8M	\$17.3M	\$20.1M	\$22.8M	\$25.6M	\$112.2M
Infrastructure Software	100-1,000	\$4.1M	\$4.7M	\$6.2M	\$7.5M	\$9.0M	\$10.7M	\$42.2M
Infrastructure Software	Less than 100	\$9.2M	\$10.1M	\$12.7M	\$14.7M	\$16.8M	\$18.8M	\$82.3M
<b>Grand Total</b>		<b>\$259.2M</b>	<b>\$298.9M</b>	<b>\$340.8M</b>	<b>\$383.4M</b>	<b>\$426.9M</b>	<b>\$480.6M</b>	<b>\$2,189.8M</b>

## Automation for Annual Refresh using ETL Tools



## Centrally controlled Assumptions sheet

	24-25	25-26	26-27	27-28	27-28
Surgical PPE Market Growth Rate	-50%	4%	4%	4%	4%
Koval Factory Domestic Market Growth Rate	-50%	4%	4%	4%	4%
Koval Factory Export Market Growth Rate	-50%	4%	4%	4%	4%
Growth Rate of Existing Surgical BU (Before Koval Expansion)	10%	10%	10%	10%	10%
Growth Rate of Existing Factory Operations (Year-over-Year)	10%	10%	10%	10%	10%
Growth Rate of Total Surgical Business Unit (Year-over-Year)	10%	10%	10%	10%	10%

	Year 1	Year 2-5
Annual Increase in Employee salaries	0%	5%
Gross Profit	8%	8%
Other Expenses	3%	3%
Discount Rate for NPV	9.25%	9.25%
Tax Rate	22%	22%
Transportation Cost (% of Rev)	0.48%	0.48%

Market Penetration in Target Regions	FY24	FY25	FY26	FY27	FY28	FY29
Market Penetration in Indian Healthcare Sector	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Market Penetration in International PPE Markets	1.00%	2.00%	2.00%	2.00%	2.00%	2.00%
Market Penetration via Distributor Networks	0.00%	0.00%	0.50%	1.00%	1.00%	1.50%
Market Share of Surgical PPE in Key Hospital Networks	0.25%	0.25%	0.25%	0.25%	0.25%	0.25%

# Case Studies

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# Data Center HVAC Services Market Sizing – Project Summary

Client: Trane Technologies | Commercial HVAC Manufacturer

## Business Problem

- Client sought to strengthen position in the rapidly growing data center market but faced gaps in services offerings, value proposition alignment, and identification of high-potential segments
- Needed a strategic roadmap covering market sizing, competitive analysis, and targeted GTM strategies to capture greater market share

## Commercial IQ Solutions

**Market Ecosystem & Trends / Competitive Assessment:** Analyzed data center segmentation, operating models, growth dynamics, ecosystem players, and competitive landscape including key competitors in building services

**DC Services Market Sizing:** Developed 2023-2028 market size forecasts for US and global DC building services; segmented by center type, ownership, new vs. existing builds, and service type

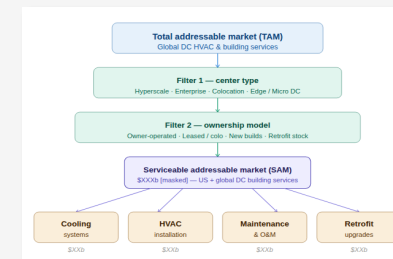
**Customer Assessment & Segmentation:** Identified key purchase criteria via interviews; segmented customers by industry, size, and geography; recommended GTM strategy with tailored messaging and win themes

**Define Client Services Portfolio:** Conducted gap assessment; defined tailored offerings and future-state SLAs by segment to enhance value proposition and capture market share

Service Type	NA	EMEA	APAC
Equipment Type	NA	EMEA	APAC
Service Category	NA	EMEA	APAC
Build Type	NA	EMEA	APAC
Contract Type	NA	EMEA	APAC

Sum of USD	Year	2023	2024	2025	2026	2027	2028 Grand Total
DC Capacity - Infrastructure Bpts							
Colocation Site							
Hyperscale							
Grand Total							



## Impact

**Structured 2023-2028 market sizing view**

delivered across US and global data center building services

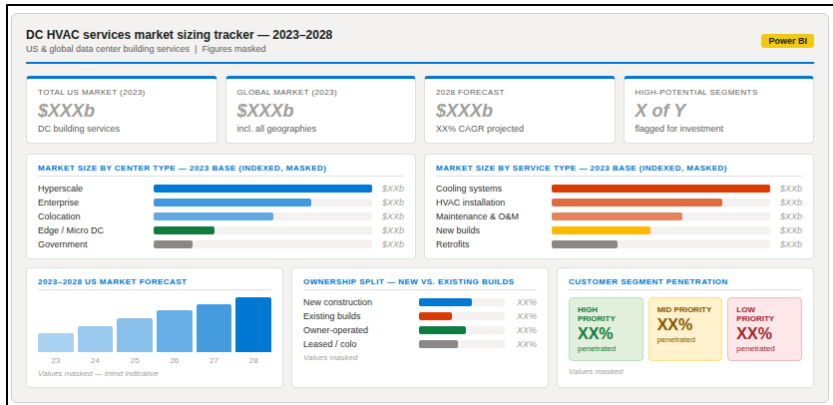
**High-potential customer segments**

identified with tailored GTM messaging and win themes

**Differentiated services portfolio** defined with future-state SLAs by customer segment

# Data Center HVAC Services Market Sizing – Work Samples

## Power BI Market Sizing Dashboard



2023–2028 DC HVAC market tracker

## Services Portfolio & SLA Framework

**Services Portfolio & SLA Framework — DC HVAC Services**  
Tailored service offerings mapped to customer segments - Gap assessment against current state - Future-state SLA targets defined - CommercialIQ analysis

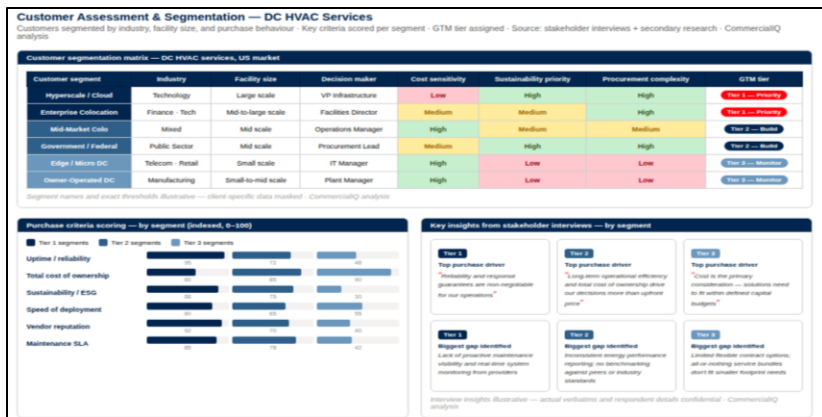
**Service portfolio — offering availability and priority by customer segment**

Service offering	Hyperscale / Cloud	Enterprise Colo	Mid-Market Colo	Government	Edge / Micro DC	Priority for development
<b>Cooling Systems</b>						
Precision cooling installation	✓	✓	✓	✗	✗	High
Liquid cooling solutions	✓	✗	✗	✗	✗	High
Free cooling / economizer	✓	✓	✗	✗	✗	Medium
<b>Maintenance &amp; O&amp;M</b>						
Preventive maintenance contracts	✓	✓	✓	✓	✗	High
24/7 emergency response	✓	✓	✗	✗	✗	High
Remote monitoring & diagnostics	✗	✗	✗	✗	✗	High - gap
<b>Energy &amp; Sustainability</b>						
Energy performance reporting	✓	✗	✗	✓	✗	High - gap
ESG / carbon reporting support	✗	✗	✗	✗	✗	Medium
<b>Retrofits &amp; Upgrades</b>						
Legacy system upgrades	✗	✓	✓	✓	✗	Medium
Modular / scalable retrofit	✗	✗	✓	✗	✗	Low

✓ Currently offered | ✗ Partially offered / in development | ✗ Not currently offered  
Offering availability indicator — specific client portfolio details masked - CommercialIQ analysis

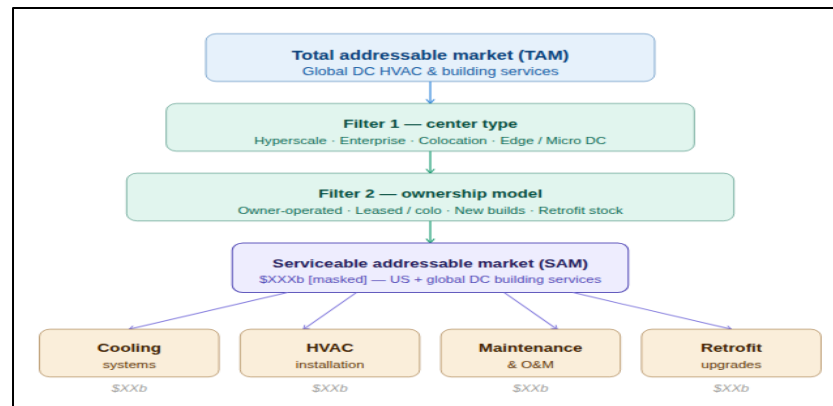
Offering gaps mapped with future-state SLAs

## Customer Assessment & Segmentation



Six-segment GTM matrix with purchase criteria scoring

## TAM to SAM Market Funnel



Market narrowed by center type and ownership model

# IT Services SaaS Implementation Services Market Sizing – **Project Summary**

## Business Problem

- Client needed a clear understanding of the professional services market size across 35 countries, without which setting realistic regional sales targets and benchmarking market share against competitors was challenging
- Client also required a forward-looking view to forecast growth opportunities over the next five years across prioritized regions

## Commercial IQ Solutions

**Global Market Sizing:** Conducted a detailed market sizing exercise for the professional services market across 35 countries, leveraging attach rates and historical contracts as key methodology inputs

**Vendor Share Analysis:** Estimated the market share of leading service providers to help the client benchmark their performance and identify competitive gaps

**Forecasting Future Growth:** Developed a five-year market size forecast based on insights gathered from expert interviews, enabling the client to identify growth opportunities and prioritize regions for investment

**Competitive Landscape Assessment:** Analyzed competitive dynamics across regions to highlight strengths, weaknesses, and areas for potential market capture

## Impact

**35-country market sized** via attach rate methodology + historical contracts, giving the client a credible baseline for regional sales targets

**6-year market growth forecast built** from expert interviews, enabling leadership to prioritize high-growth regions

**Vendor market share benchmarked** across leading providers, enabling the client to quantify gaps and sharpen market positioning

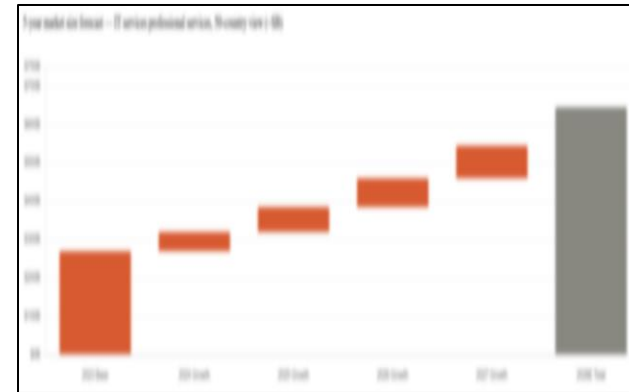
# IT Services SaaS Implementation Services Market Sizing- **Work Samples**

## Vendor market share analysis



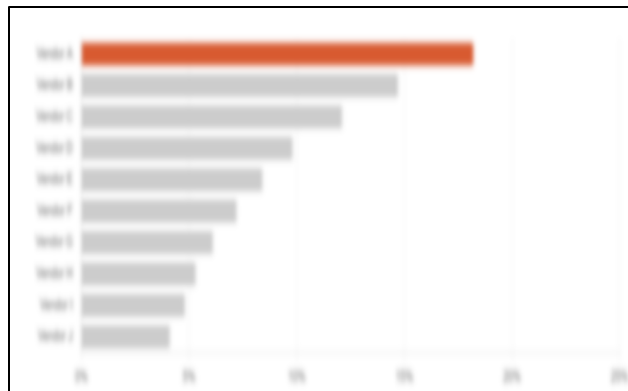
Sized and visualised the market share of leading vendors by industry segment, giving the client a clear view of the competitive landscape and where they stood relative to the overall market.

## 5-year market size forecast - professional services market (\$B)



Modelled the annual market size build-up over five years using expert interview insights, showing the incremental growth trajectory and total opportunity the client could plan against.

## Vendor market share breakdown



Ranked individual vendors by estimated market share to identify the client's nearest competitors, the gap to market leaders, and where consolidation or share capture opportunities existed.

## IT Services Excel Model

Attach rate inputs	50-country build-up	Vendor share	5-yr forecast	C - Value	D - Unit	E - Source
<b>Section 1 - Attach rate derivation (historical contract analysis)</b>						
Historical contracts reviewed	Primary data - client contract database	XXX	contracts			Client historical data
Attach rate - contract type A	Seed input: services attach to base contract	XXX%	% of contracts			Historical analysis
Attach rate - contract type B	Seed input: services attach to base contract	XXX%	% of contracts			Historical analysis
Attach rate - contract type C	Seed input: services attach to base contract	XXX%	% of contracts			Historical analysis
Avg. revenue per attached contract	Weighted across all contract types	\$XXXX	USD			Historical analysis
<b>Blended attach rate (weighted avg.) -&gt; XXX% (masked)</b>						
<b>Section 2 - 50-country market build-up</b>						
North America market size	=contracts * attach rate * avg. rev.	\$XXB	USD			Attach model + secondary research
Western Europe market size	same structure	\$XXB	USD			Attach model + secondary research
UK market size	same structure	\$XXB	USD			Attach model + secondary research
ANZ market size	same structure	\$XXB	USD			Attach model + secondary research
(Remaining 46 countries - same structure)	Base factor for display					
<b>Total - 50-country market (2023) -&gt; \$XXXX (masked)</b>						
<b>Section 3 - Vendor share benchmarking</b>						
Vendor A - estimated market share	Secondary research + expert interviews	XXX%	% share			Public filings, expert interviews
Vendor B - estimated market share	Secondary research + expert interviews	XXX%	% share			Public filings, expert interviews
Client - estimated market share	Derived from revenue vs. total market	XXX%	% share			Client data + model
Competitive gap to market leader	=C14-C18	XX pp	ppt			Gap to close
<b>Implied revenue uplift if gap closed 50% -&gt; \$XXXX (masked)</b>						
<b>Section 4 - 5-year forecast (expert interview synthesis)</b>						
Base year market (2023)	=C14	\$XXB	USD			
Projected CAGR - expert consensus	Weighted from X expert interviews	XXX%	% p.a.			Expert interviews
2028 market size - central case	=C22*(1+C23)^5	\$XXB	USD			Delivered
<b>Total incremental opportunity (2023-2028) -&gt; \$XXXX (masked/confidential)</b>						

Attach rate model built from historical contract analysis, sizing the full 50-country market, benchmarking vendor share, and projecting a 5-year growth scenario.

# Profile

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# About the founder – Jatin Modi



Jatin Modi  
Founder - Stratkalytics Consulting



A seasoned Ex-MBB Strategy and Analytics Consultant with deep expertise in **market sizing, pricing strategy, and go-to-market execution**. Jatin brings over eight years of experience delivering scalable, data-driven solutions at **Gartner, Bain & Company, and PwC**. He holds an MBA in IT Business Management and a Bachelor's degree in Computer Applications.

**Key Industries:** Manufacturing, High Tech, Pharmaceuticals

Jatin Modi's experience includes:

- **Fortune 50 IT Services Provider:** Built an enterprise-grade market sizing and vendor-share model covering 30+ software markets and 50+ vendors, leveraging 5M+ data points from D&B and secondary sources; model was adopted as a single source of truth for strategy and planning teams.
- **Global IT Services Provider:** Developed a market sizing framework used to set global sales targets across regions and service lines, with clear assumptions, market taxonomy, and refreshable sizing logic for annual planning cycles.
- **HVAC Manufacturer (Data Center Segment):** Led end-to-end data center HVAC services market sizing, including segmentation by data center type, geography, and service category, directly informing investment and GTM prioritization.
- **Telecom Services Provider (Software Expansion):** Conducted market sizing and opportunity assessment to support entry into adjacent software and digital services markets, including TAM/SAM estimation and competitive landscape mapping.

# Appendix - PoV

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# Market Sizing Helps Estimate Demand, But the Approach Varies

Market sizing is the process of **estimating and quantifying the total demand for a product, service, or industry.**

Types of market sizing:



## High-Level Market Sizing

- Broad industry estimates, e.g., "The global cloud computing market is \$X billion in 2024 and will grow at a CAGR of XX%"
- Useful for investors, executives, and strategic planning



## Wide Coverage Market Sizing

- Covers multiple dimensions like countries, product/service categories, customer segments, and pricing tiers
- Example: Estimating total software spend across industries and regions



## Actionable Market Sizing

- Granular, account-level opportunity sizing (e.g., potential revenue from specific customers)
- Used for sales targeting, and GTM execution.



## Combination of Approaches

- Blends multiple techniques depending on business needs, budget and data availability
- Example: Using macro trends for high-level insights but customer-level data for execution

# Market Sizing Has Multiple Use Cases, and the Level of Detail Depends on the Objective

Common use cases for market sizing:

## Level of Depth in Sizing



### Fundraising and Expansion

- Raise funds for entering a new business or expansion
- Use high-level market sizing to provide a ballpark estimate of the opportunity
- Focus on TAM (Total Addressable Market) and industry trends.

### Product Demand & Marketing Strategy

- Estimate demand for a product/service & develop a marketing strategy
- Calculate potential revenue and validate product-market fit
- Identify customer segments, industry adoption rates, and pricing benchmarks

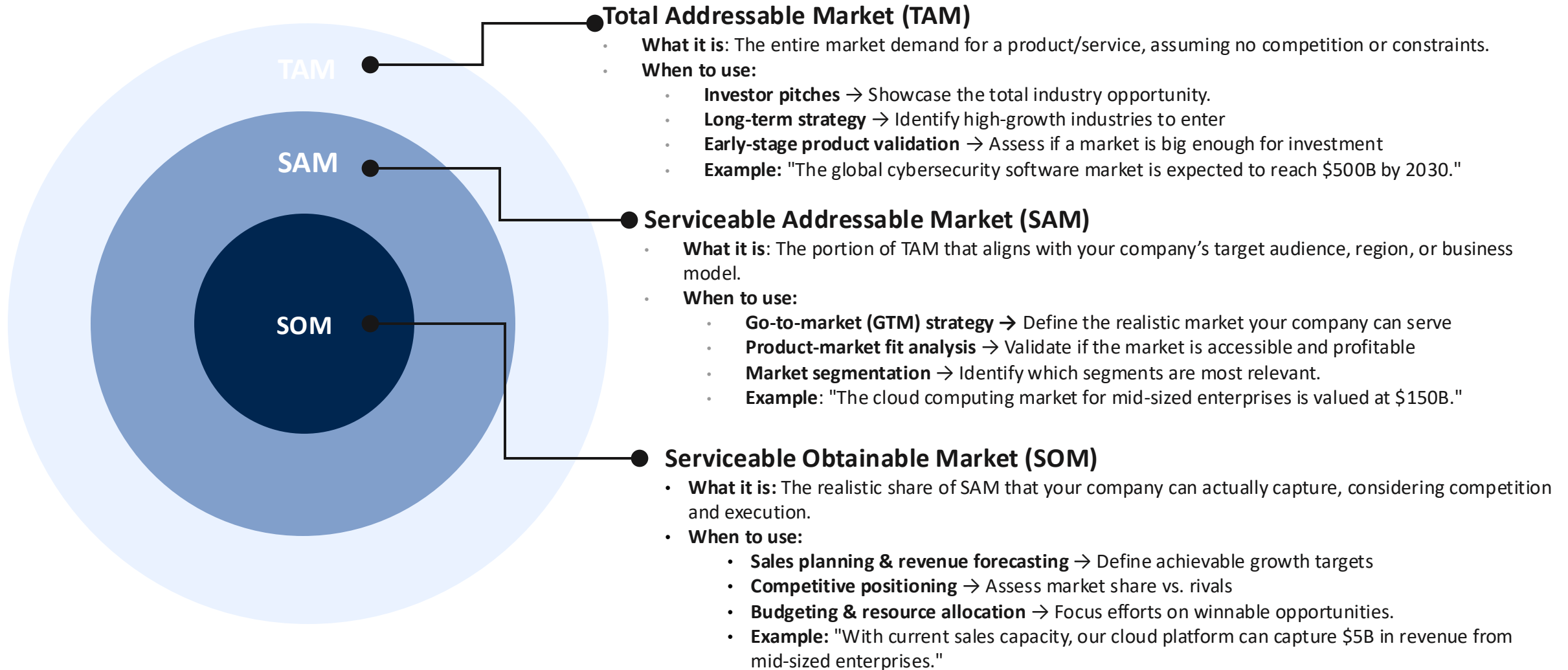
### Sales Targeting

- Set sales targets for sales reps
- Define realistic quotas based on market potential and historical sales performance
- Use actionable market sizing to estimate revenue opportunities by account or region

### Market Penetration

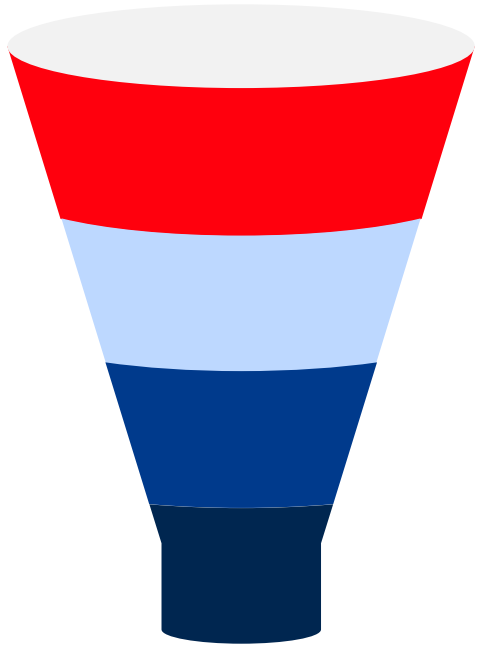
- Capture additional market share (Who to target?)
- Identify high-potential segments and competitive gaps
- Use granular, bottom-up analysis to pinpoint underpenetrated regions, industries, or customer segments

# Not All Market Sizing is the Same—How TAM, SAM, and SOM Differ



# There are two primary ways to size any market – Top-Down and Bottom-Up

## Top-Down Approach

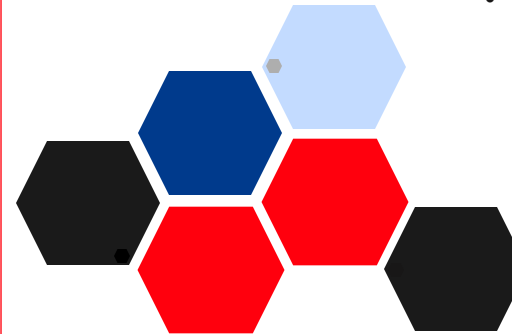


- Starts with **broad industry data**, then narrows down using assumptions
- Relies on **industry reports, government data, and macroeconomic trends**
- **When to use:**
  - **Early-stage business planning** → Quick, directional estimate of market potential.
  - **Investor presentations** → Provides a compelling story based on credible industry sources.
  - **Estimating large, broad markets** → When granular data isn't available

### Example

- Total cloud computing market is \$500B
- mid-sized enterprises are 30%
- Market size for mid-sized enterprises = \$150B

## Bottom-Up Approach



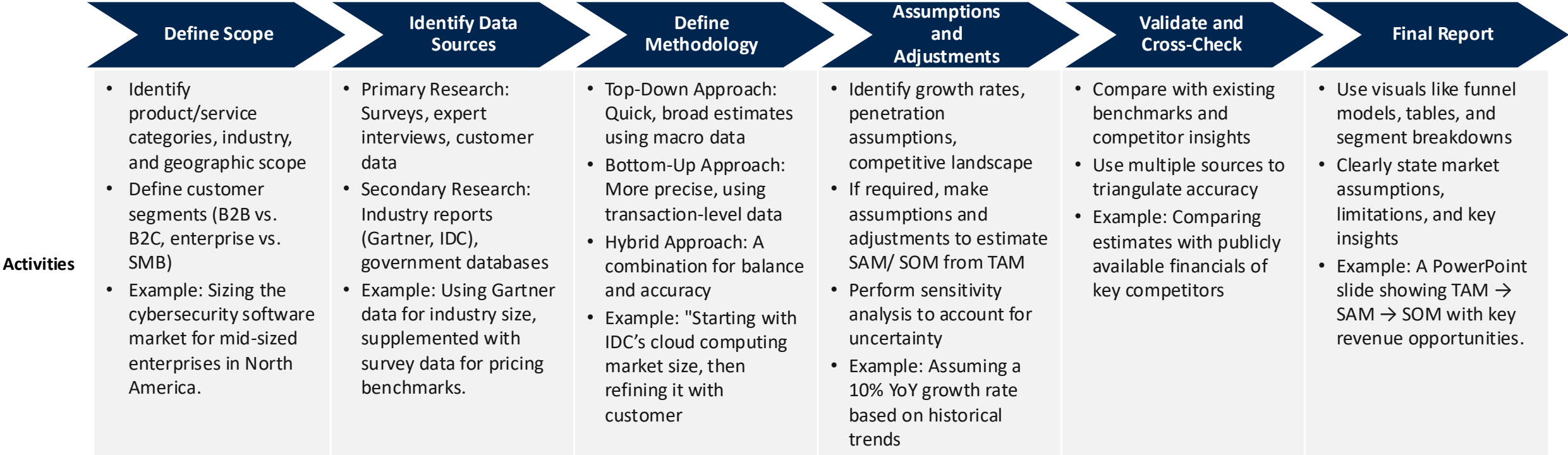
- Starts with **actual data** (customers, pricing) and scales up
- Uses **customer surveys, sales data, and industry benchmarks**
- **When to use:**
  - **Detailed business cases** → When precision matters for budgeting or sales planning
  - **Product pricing & GTM strategy** → To understand revenue potential by segment
  - **Targeted market expansion** → Identifying realistic opportunities based on customer adoption.

### Example

- Total customers purchasing cloud computing services is 10,000
- Average annual spend per customer is \$15,000
- Market size = \$150M

# Market Sizing Follows a Structured Approach—From Defining Scope to Validating Results






Overall approach for market sizing:



Choosing the right tool is crucial for market sizing. Large datasets may require advanced ETL tools like Alteryx for processing, while Excel is ideal for testing assumptions. Often, a combination of both works best—Alteryx for heavy lifting and Excel for scenario modeling

# Accurate Market Sizing Requires the Right Data, Assumptions, Methodology & Validation

Key things to consider while market sizing:

<p>1  Accurate Data</p>	<ul style="list-style-type: none"><li>• Reliable market sizing starts with quality data and sources vary based on the market and use case</li><li>• Public sources (macro-economic data, firmographic databases, industry reports)</li><li>• Purchased datasets (ZoomInfo, IDC, Gartner, CapIQ)</li><li>• Internal client data (CRM, sales records, past research).</li><li>• When data is limited, use surveys, expert interviews, or proxies to fill gaps.</li></ul>
<p>2  Right Key Assumptions</p>	<ul style="list-style-type: none"><li>• Not all data is directly available, so assumptions play a crucial role</li><li>• Every assumption must have a logical rationale behind it</li><li>• When assumptions are weakly supported, validate them through expert interviews, short surveys, or internal benchmarks</li></ul>
<p>3  Right Methodology</p>	<ul style="list-style-type: none"><li>• Market sizing methodology depends on:<ul style="list-style-type: none"><li>• What is being sized? (Market, product, service)</li><li>• What data is available? (Full vs. partial data)</li></ul></li><li>• The methodology should make logical sense for the industry—not every approach works everywhere</li></ul>
<p>4  Triangulation</p>	<ul style="list-style-type: none"><li>• For higher accuracy, use multiple sizing methodologies</li><li>• A primary methodology should be detailed, and secondary sources (industry reports, competitor analysis) should validate it</li></ul>
<p>5  Sensitivity Analysis</p>	<ul style="list-style-type: none"><li>• Market sizing relies on assumptions, so small changes can have a big impact</li><li>• Example: If a key assumption changes by 10%, the market size estimate may change by 10% or more</li><li>• Always test different scenarios to provide a range of possible market sizes instead of a single number.</li></ul>



**Thank You**