SDI ScienceDocs Inc.
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TAM / SAM / SOM Worksheet

A practical market-sizing worksheet for early commercialization, SBIR/STTR planning, investor preparation, licensing discussions, and go-to-market strategy.

Project / technology:	_____	**Prepared by:**	_____
Primary market segment:	_____	**Date / version:**	_____
Geographic scope:	_____	**Target buyer/user:**	_____
Commercialization pathway:	☐ Direct sale ☐ License ☐ Spinout ☐ Partner ☐ Other		

1. Purpose and Working Definitions

Use this worksheet to estimate the reachable commercial opportunity for an idea, technology, product, service, or university spinout. The goal is not false precision. The goal is to make assumptions visible, identify what evidence is missing, and create a defensible early market-sizing narrative.

Market layer	Definition	Key question
TAM - Total Addressable Market	The broad annual market opportunity if the solution could serve the full relevant market.	How big could this market be in principle?
SAM - Serviceable Available Market	The portion of TAM that fits the specific product, segment, geography, regulation, business model, or technology scope.	What market is actually addressable by this offering?
SOM - Serviceable Obtainable Market	The realistic share of SAM that could be captured over a defined time period based on resources, adoption barriers, sales capacity, and competition.	What can we plausibly win in 1-5 years?

2. Market Segment and Use Case Framing

Item	Prompt	Working answer
Primary use case	What specific job, pain point, workflow, clinical/scientific need, operational problem, or commercialization opportunity does this address?	
Initial customer segment	Who has the problem and budget?	

	Examples: hospitals, biotechs, labs, manufacturers, logistics firms, universities, government agencies.	
Initial user segment	Who would use or be affected by the solution? User and buyer may be different.	
Market boundary	What is included and excluded from this market sizing exercise?	
Geographic boundary	U.S., North America, EU, global, state/local, specific institutional market, or other.	
Time horizon	One-year, three-year, five-year, or SBIR Phase I-to-Phase II commercialization horizon.	

3. TAM Estimate - Broad Market Opportunity

TAM method	How to estimate	Estimate
Top-down TAM	Industry reports, public datasets, agency reports, market research, government procurement data, trade groups, published literature.	$ _____ per year
Bottom-up TAM	Number of potential customers or users multiplied by annual revenue per customer/user.	$ _____ per year
Comparable market proxy	Comparable product category, adjacent workflow spend, incumbent tool spend, labor cost replacement, or operational loss avoided.	$ _____ per year
Preferred TAM estimate	Select the estimate that is most defensible for the current stage and explain why.	$ _____ per year

4. Bottom-Up Calculation Worksheet

Input	Guidance	Value
Potential customers / institutions	Example: number of labs, hospitals, manufacturers, agencies, universities, logistics sites, or startups in scope.	_____
Average relevant units per customer	Example: users, facilities, instruments, departments, projects, workflows, or sites.	_____
Estimated annual price or value per	Subscription, service fee, license,	$ _____

unit	project value, savings value, or transaction value.	
Annual purchase frequency or usage factor	One-time, annual renewal, monthly usage, project-based, or repeat purchase rate.	_____
Estimated annual TAM	Customers × units × price/value × usage factor.	$ _____

TAM assumption notes: What sources or logic support the estimate?

_____

_____

_____

5. SAM Estimate - What You Can Actually Serve

SAM filter	Question	Working answer / estimate
Product fit	Which parts of the broad market can this product or service realistically support now or in the next 1-3 years?	
Technology fit	Which customers have the technical infrastructure, data, equipment, workflow, or expertise needed to adopt?	
Regulatory / evidence fit	Which segments can be served before additional regulatory clearance, clinical evidence, validation, security review, or procurement approval?	
Geographic fit	Which geographies are practical based on sales, logistics, regulation, language, support, and partner coverage?	
Business model fit	Which customers match the pricing model, buying process, and support burden?	
Estimated SAM	State the serviceable available market and the filtering logic used.	$ _____ per year

6. SOM Estimate - Realistic Early Capture

SOM driver	Question	Working answer / estimate

Early adopter segment	Which small but credible segment is most likely to buy, pilot, license, or partner first?	
Sales / outreach capacity	How many qualified prospects can the team realistically reach, meet, pilot, and close?	
Conversion assumptions	Expected prospect-to-meeting, meeting-to-pilot, pilot-to-sale, or license-conversion rates.	
Competitive pressure	How strongly are incumbents, substitutes, in-house solutions, or procurement barriers likely to reduce capture?	
Implementation capacity	How many customers can be onboarded or supported without overextending the team?	
Estimated SOM	Expected obtainable revenue, contracts, licenses, pilots, or market share over the stated horizon.	$ _____ over ____ years

7. Evidence Tracker for Market Sizing Sources

#	Source / link / citation	Evidence type	Relevant finding	Confidence	How it affects TAM/SAM/SOM
1		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐ Competitor ☐ Other		☐ Strong ☐ Moderate ☐ Weak	
2		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐ Competitor ☐ Other		☐ Strong ☐ Moderate ☐ Weak	
3		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐		☐ Strong ☐ Moderate ☐ Weak	

		Competitor ☐ Other			
4		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐ Competitor ☐ Other		☐ Strong ☐ Moderate ☐ Weak	
5		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐ Competitor ☐ Other		☐ Strong ☐ Moderate ☐ Weak	
6		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐ Competitor ☐ Other		☐ Strong ☐ Moderate ☐ Weak	
7		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐ Competitor ☐ Other		☐ Strong ☐ Moderate ☐ Weak	
8		☐ Customer interview ☐ Public data ☐ Report ☐ Literature ☐ Procurement ☐ Competitor ☐ Other		☐ Strong ☐ Moderate ☐ Weak	

8. Assumption Quality Scorecard

Score each item: 1 = weak or speculative, 2 = partially supported, 3 = well supported. Use the notes column to identify what evidence must be gathered next.

Area	Prompt	1	2	3	Notes / Evidence
Customer count	Number of potential customers is based on reliable data.	☐	☐	☐	
Pricing/value	Annual value per customer is supported by comparable pricing, budgets, or savings.	☐	☐	☐	
Segment definition	The initial segment is specific enough to target.	☐	☐	☐	
Buyer clarity	Economic buyer and user roles are identified.	☐	☐	☐	
Adoption logic	Procurement, implementation, and switching barriers are considered.	☐	☐	☐	
Competition	Alternatives and incumbents are included in the estimate.	☐	☐	☐	
Evidence	Customer, market, literature, or public data supports the assumptions.	☐	☐	☐	
Feasibility	Team capacity and commercializatio n pathway are realistic.	☐	☐	☐	

9. TAM / SAM / SOM Summary Table

Layer	Estimate	Definition / rationale	Confidence
TAM	$ _____	Broad market definition:	Confidence: ☐ Low ☐ Medium ☐ High
SAM	$ _____	Serviceable segment definition:	Confidence: ☐ Low ☐ Medium ☐ High
SOM	$ _____	Obtainable share/time horizon:	Confidence: ☐ Low ☐ Medium ☐ High

10. Market-Sizing Narrative Draft

Use this section to turn the numbers into a short narrative for a pitch deck, grant commercialization plan, licensing discussion, or investor memo.

Draft narrative: market size, segment focus, logic, and confidence level

_____

_____

_____

_____

_____

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11. Next-Step Action Plan

#	Action	Priority	Owner	Due date	Status
1	Validate customer count with better data	☐ Low ☐ Medium ☐ High			☐ Not started ☐ In progress ☐ Done
2	Conduct customer or stakeholder interviews	☐ Low ☐ Medium ☐ High			☐ Not started ☐ In progress ☐ Done
3	Confirm pricing or value assumptions	☐ Low ☐ Medium ☐ High			☐ Not started ☐ In progress ☐ Done
4	Refine segment boundaries and exclusions	☐ Low ☐ Medium ☐ High			☐ Not started ☐ In progress ☐ Done

5	Compare against competitors or substitutes	☐ Low ☐ Medium ☐ High			☐ Not started ☐ In progress ☐ Done
6	Revise TAM/SAM/SOM estimates	☐ Low ☐ Medium ☐ High			☐ Not started ☐ In progress ☐ Done

12. Final Review Checklist

	Review item
☐	TAM, SAM, and SOM are clearly defined and not used interchangeably.
☐	At least one top-down and one bottom-up estimate were considered.
☐	Customer/user/buyer segments are specific enough for outreach.
☐	Pricing, value, or revenue assumptions are documented.
☐	Regulatory, evidence, procurement, and implementation constraints are reflected in SAM/SOM.
☐	Competitive alternatives and workarounds are considered.
☐	The estimate is accompanied by evidence quality and confidence level.
☐	Next evidence-gathering actions are assigned to owners.

Need help applying this tool? ScienceDocs supports commercialization, change management, AI adoption, grant strategy, and operational optimization.