HG Insights

STARTER KIT

Building a TAM/SAM/SOM View That Reaches Monday Morning

A practical guide for RevOps leaders who need their market sizing to survive contact with the sales floor

This guide walks a RevOps Director or VP build a TAM/SAM/SOM view that goes beyond the slide deck. The goal is to have a better market sizing process that connects directly to territory design, account assignment, and quota, so the segmentation your team builds actually changes what a rep works on Monday morning.



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Who This Guide Is For

This guide is written for RevOps Directors, VPs, and Sales Operations leaders at B2B SaaS and technology companies. You are likely reading this up because something forced the question: new leadership asking “what’s our real addressable market,” an M&A event that merged two customer bases and two definitions of “ideal customer,” a headcount change that means territories need to be recut, or the start of a planning cycle where last year’s segmentation is due for a hard look.

You don’t need to be convinced that market sizing matters. You already own the handoff from strategy to execution, and you already know where that handoff tends to break. This guide is the tactical process for closing that gap, rather than pitching for why it is important.

The Problem

Most RevOps teams do not have a market sizing problem. They have a market sizing handoff problem. Strategy or marketing builds a TAM/SAM/SOM model, it gets presented once, and then it sits in a deck while territory design, account assignment, and quota setting happen elsewhere, built on a different, older, informally-inherited definition of who the ideal customer actually is.

Ask most RevOps leaders where their current segmentation came from and the honest answer is some version of: it is whatever the company's first ten customers happened to look like. Nobody set out to build it that way. It simply never got revisited, because revisiting it has historically meant another round of analyst slides rather than a usable, refreshable account list.

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CHALLENGE	IMPACT ON REVOPS
Segmentation inherited from early customers, never formally validated	Reps work against an ICP nobody can defend in a planning review
Market sizing lives in a slide deck, refreshed annually at best	Territory and quota decisions are made on stale assumptions by the time they reach the field
Strategic market sizing and operational territory design use different data and owners	Rep books, account assignment, and quota math do not trace back to the approved market model
No shared, defensible definition of the addressable market	Sales and RevOps debate the size of the opportunity instead of planning against it

THE GAP

The gap most organizations never close is not the market sizing exercise itself, it is the handoff: translating TAM/SAM/SOM into territory design, account assignment, and quota using the same data definitions and account hierarchies on both sides. Until that handoff is closed, market sizing remains a planning artifact instead of an operating input.

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The Approach

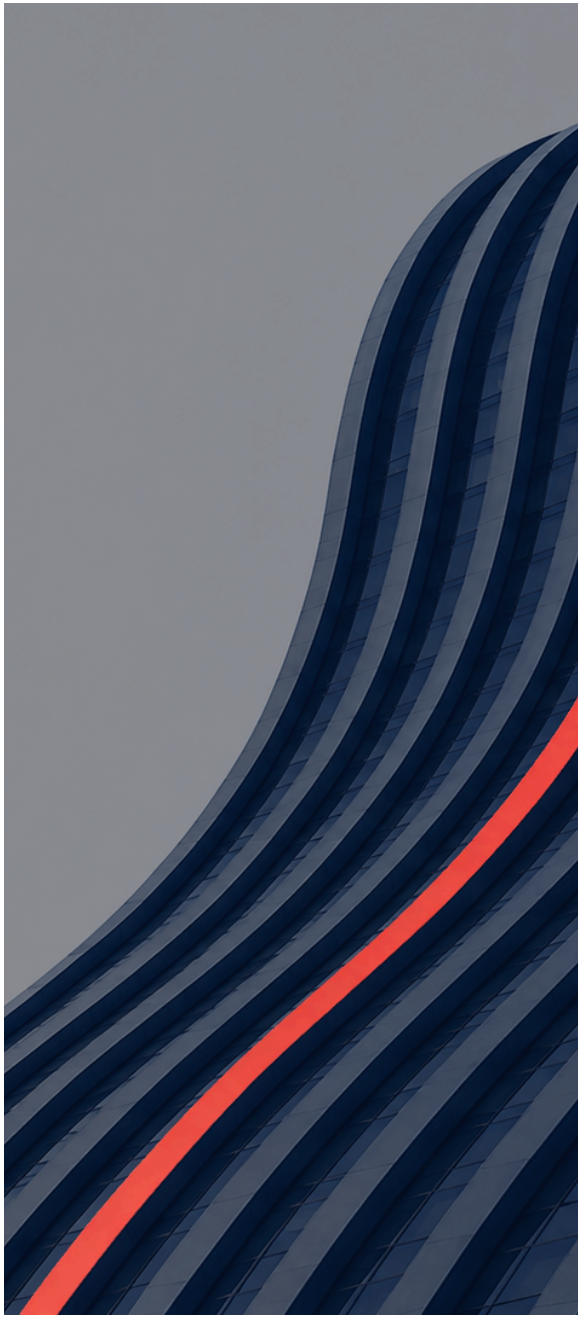
The fix is not a better one-time market sizing project. It is building the view so that it refreshes on its own, grounded in spend and technographic data rather than assumptions.

That means two shifts in how RevOps approaches this work:

Stop treating TAM/SAM/SOM as a one-time strategic exercise. Built once a year from a mix of analyst estimates and internal hypotheses, it is out of date by the time anyone acts on it. Built from forward-looking IT spend projections and technology installation data that refresh on a defined cadence, it stays current enough to replan against mid-cycle, not just at the next annual kickoff.

Stop treating market sizing and territory design as two separate projects with two separate owners. The market sizing output and the territory design input need to be the same account list, built from the same definitions, so a RevOps leader can move from "here is our addressable market" to "here is this rep's book of accounts" without a data reconciliation project in between.

> **WHAT FOLLOWS**
>
> The rest of this guide is the four-step process for doing both.



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THE FOUR-STEP PROCESS

1 Define a Total Addressable Market You Can Defend

Start by replacing the inherited ICP with a TAM grounded in actual IT spend data rather than a guess at who looks like your best customers.

- Select the IT spend categories that reflect what you actually sell. Use HG Insights' Market Analyzer taxonomy to target IT categories where your product actually competes, avoiding broad industry labels.
- Apply weightage to each category where a spend category maps to your solution.
- Use forward-looking spend projections, not backward-looking survey data or static industry reports, as your baseline. A TAM built on what companies are already projected to spend in the next year reflects budget reality.
- Treat this as the step where you replace “our first ten customers” with “the categories of spend our product actually addresses.” This is the single highest-leverage move in the entire process, because every downstream step inherits whatever assumption you make here.

PRO TIP

If you cannot articulate your TAM as a specific list of spend categories with a rationale for each one, you do not have a validated TAM yet. You have a label. Go back to the categories before moving to Step 2.

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2 Refine to a Serviceable Available Market Using Industry and Geography, Not Guesswork

With TAM defined by spend, narrow to the subset of that market you can actually serve and sell into.

- Choose a top-down approach if you are entering a market or redefining strategy: select the target industries and geographies directly, based on strategic intent rather than existing book of business.
- Choose a bottom-up approach with a validated base of good-fit customers: build the SAM from where you are already winning, using your own customer data as the signal rather than a market hypothesis.
- If certain verticals or regions are out of scope for compliance, capacity, or strategic reasons, exclude them here so the number that reaches territory planning is already realistic.
- Revisit this definition on a cadence tied to your planning cycle, not just once a year. Industry and geography scope shift as the business expands or contracts focus, and an unrefreshed SAM quietly drifts out of sync with where sales is actually being told to sell.

PRO TIP

SAM is the layer most often left stale after the first build. Put an owner and a review date on it the same way you would on a forecast, not just on the initial model.

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3 Identify a Serviceable Obtainable Market Using Firmographic and Technographic Fit

This is where the market model turns into a list of real, named accounts, and where ICP validation actually happens.

- Define company size parameters, employee count and revenue range, that reflect accounts your team can realistically serve and close, not just accounts that technically fit the industry and geography filters.
- Layer in technology installation data as a fit signal: which companies have the technology stack, cloud posture, or adjacent tooling that correlates with being a good-fit customer. This is the technographic layer that moves ICP from a demographic guess to a validated, evidence-based profile.
- Use required and excluded technology criteria deliberately. If a specific install is a strong positive signal, include it. If a competitive install or an incompatible stack disqualifies a company, exclude it explicitly rather than filtering it out manually later.
- Once TAM, SAM, and SOM are all defined, SOM becomes your most granular, most operationally useful view, the one that should be driving territory design and account assignment, not the headline TAM number from the board deck.

PRO TIP

SOM is the layer that should feel uncomfortable the first time you build it. If it looks identical to your current CRM account list, you have not actually validated anything, you have just reproduced the inherited ICP in a new tool.

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4 Connect the View to Territory Design, Account Assignment, and Quota

This is the step most market sizing processes never reach, and it is the one that determines whether any of the first three steps change rep behavior.

- Export the SOM-level company list as the starting universe for territory design, rather than letting territory planning start from a separately-built or inherited account list.
- Run the territory capacity math against that universe: given quota, average deal size, and expected conversion rate, how many accounts can each rep actually work, and does the SOM universe support the headcount plan.
- Resolve account hierarchy and ownership by deduplicating corporate hierarchy, parent companies, subsidiaries, and ownership structures.
- Reconcile quota to the same market definition. If quota was set against one view of the market and territories are built against another, the mismatch surfaces the moment a rep questions whether their number is achievable, and it is RevOps that has to answer for it.
- Build the refresh into your planning calendar, not just your initial rollout. A market view that updates as spend projections and technographic signals change is only useful if territory and account assignment are revisited on the same cadence, rather than locked for a full year against a snapshot.

PRO TIP

The test of whether this step worked is simple: can a rep look at their book of accounts and trace it back to a market definition RevOps can explain in one sentence? If the answer is no, the handoff is still broken, regardless of how sophisticated the TAM/SAM/SOM model itself is.

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What RevOps Leaders Are Actually Asking For

Across recent conversations with RevOps and sales operations leaders working through this exact problem, a few patterns show up consistently, independent of company size:

"Our ICP is whatever our first customers happened to look like."

This is the single most common starting point. Teams rarely built their segmentation on purpose; it accreted from early wins and was never revisited once the company scaled past its first few accounts.

"How do we carve territories for a small team without enterprise-scale tooling?"

Growth-stage RevOps leaders in particular want territory and quota guidance sized to a 5 to 10 person sales team, not a framework built for a 200-rep enterprise org.

"We can present a market size to the board, but we can't turn it into rep assignments."

The strategic story and the operational reality are built and owned separately, and leaders describe the translation between them as something that currently happens in spreadsheets, if it happens at all.

"We want a market view that updates, not one we rebuild from scratch every planning cycle."

Leaders increasingly expect market sizing to behave like a forecast: refreshed on a cadence.

"We need the same data feeding strategy and territory design, not two versions of the truth."

The request for a single, shared, defensible segmentation that both strategy and RevOps can plan against comes up repeatedly, framed as a trust problem as much as a data problem.

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How It Fits Into Your Existing Stack

A continuously refreshable TAM/SAM/SOM view is only useful if it plugs into the systems your team already runs territory design, account assignment, and quota planning through.

WORKFLOW	WHAT MARKET ANALYZER PROVIDES	WHERE IT ACTIVATES
Market sizing and ICP validation	TAM/SAM/SOM built from IT spend taxonomy, firmographics, and technographic fit signals	Market Analyzer workspace, refreshed on a defined cadence
Territory design	SOM-level company list as the starting universe for territory and capacity planning	Exported company lists feeding your territory planning process
Account assignment	Firmographic and technographic fit data to prioritize and route accounts	CRM account fields and rep book assignment
Quota planning	A shared, defensible market definition both strategy and RevOps plan against	Planning models built on the same SOM-level universe used for territories

PLATFORM COMPONENTS USED IN THIS GUIDE

HG Insights' Contextual Intelligence Platform, built on Fabric (technographics, IT spend, firmographics, and company hierarchy data), powers Market Analyzer, the HG Copilot used throughout this process for market sizing, ICP validation, and whitespace identification.

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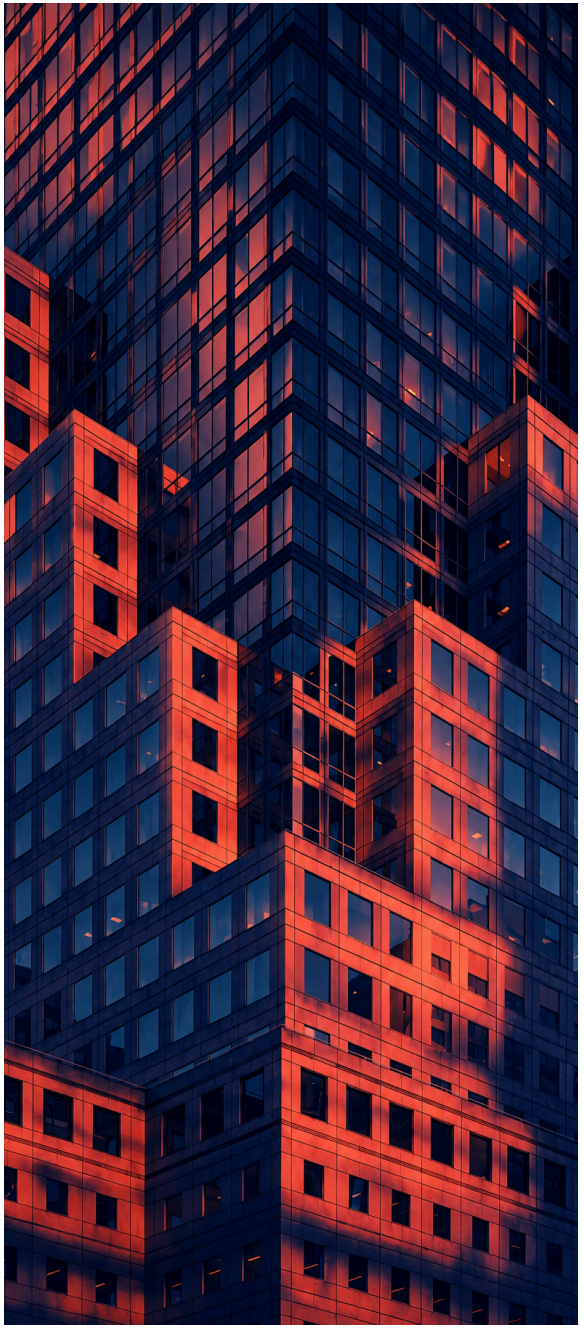
30-Day Activation Checklist

- [ ] **1.** Pull your current ICP definition and document exactly where it came from; if the honest answer is "our first ten customers," flag it for replacement rather than refinement.
- [ ] **2.** Select the specific IT spend categories your product competes in, rather than a broad industry label, to define your TAM.
- [ ] **3.** Set relevance weightings on each selected spend category where only part of the category maps to your solution, rather than accepting the full-category default.
- [ ] **4.** Decide, explicitly, whether your SAM should be built top-down from strategic intent or bottom-up from your existing best-fit customers, and document the rationale.
- [ ] **5.** Define your SOM using employee count, revenue range, and required or excluded technology installs, not industry and geography alone.
- [ ] **6.** Deduplicate your SOM-level company list by corporate hierarchy and ownership before using it for any downstream math.
- [ ] **7.** Export the SOM-level company list and compare it line-by-line against your current CRM account assignments; document every discrepancy rather than reconciling silently.
- [ ] **8.** Run territory capacity math (quota divided by average deal size divided by expected conversion rate) against the SOM universe to confirm headcount and account volume are aligned.
- [ ] **9.** Reconcile your quota model to the same SOM-level market definition used for territory design, and flag any quota numbers that were set against a different account universe.
- [ ] **10.** Put a refresh cadence and an owner on the TAM/SAM/SOM view itself, tied to your planning calendar, so it does not quietly go stale the way the previous segmentation did.

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Additional Resources

- **Market Analyzer product overview** HGINSIGHTS.COM/MARKET-ANALYZER →
- **HG Insights blog, GTM segmentation and planning** HGINSIGHTS.COM/BLOG →
- **Request a working session** to walk your current segmentation through this process HGINSIGHTS.COM/DEMO →



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