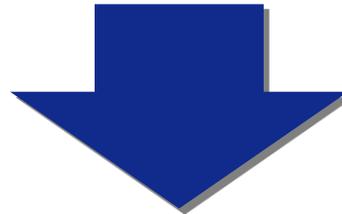


***The Client – a manufacturer of industrial labeling tools and consumables – wanted a holistic view of the North American and European markets for the categories of tools and consumables that it plays in***

**The problem**

(1 of 3)

- ❖ The Client had six primary and three secondary verticals that it wanted nxtMOVE to focus on
  - ✓ The primary verticals were installers in: electrical installation / repair, datacom installation / repair, security system installation / repair, professional audio-visual installation, inventory management system installation and general office labeling
  - ✓ The secondary verticals were defense, manufacturing / warehouse / MRO and other
    - Other included education, transportation, laboratories, new commercial construction and re-fitting
- ❖ The Client also asked nxtMOVE to assess the size of the market from two different perspectives – the POS market and the manufacturer-level market (i.e., industrial distribution purchases)

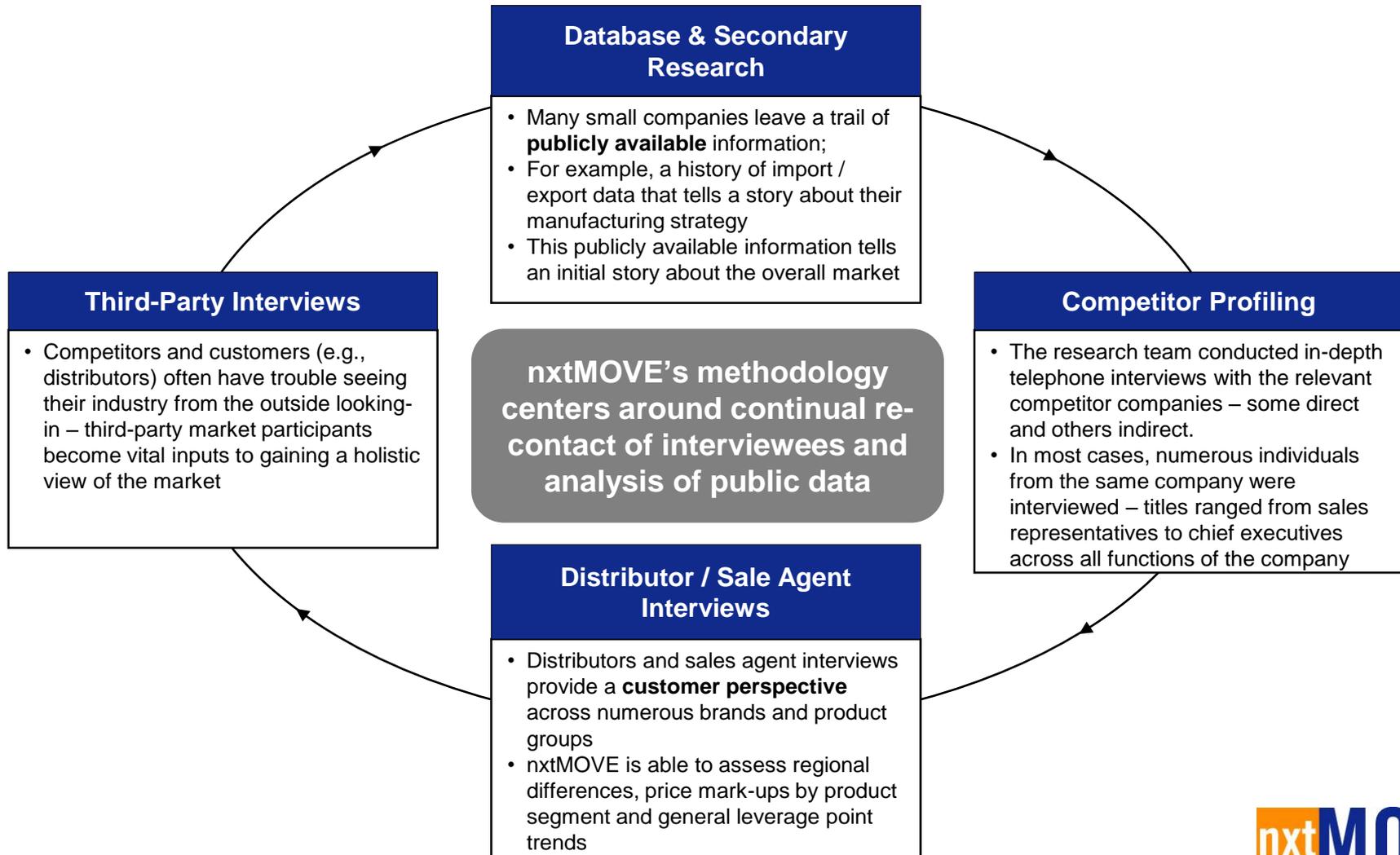


**nxtMOVE applied a multi-faceted, qualitative interview approach to assess volumes, perceptions and price points with participants in the sales and distribution channels. The inputs collected were used as inputs in an iterative global model that the Client can adjust as prices / volumes change or market participants change.**

## *nxtMOVE's approach centered around in-depth conversations with customers, competitors and channel partners in North America and Europe*

### The approach

(2 of 3)



***nxtMOVE's sizing model provided the Client with an iterative system for updating market size in targeted global categories, thus enabling them to make faster, more effective product development decisions***

**The results**

(3 of 3)

- The inputs from the interviews that nxtMOVE conducted with channel partners were used as inputs to both the POS and manufacturer-level market sizing models. Prices and sales figures were converted from local currency back to the dollar, and the model provided tools for the Client to also make currency exchange adjustments as the currency markets fluctuated
- The in-depth interviews (and constant re-contact of key market participants) also provided the Client with a clear understanding of its competitors' market and product development strategies. This insight proved to be invaluable as the Client attacked particular tool categories and targeted key retail and industrial distribution accounts
- To date, the Client continues to re-evaluate the inputs for the sizing model and updates the global size annually

