

Product Diligence & Growth Strategy

Capabilities

- **Competitive product assessment:** Quantify defensibility and identify capability gaps that impact valuation and growth.
- **Product fit validation:** Evaluate alignment between roadmap priorities and market growth segments to validate the investment thesis.
- **Product growth Blueprint:** Define and prioritize high-ROI product initiatives that form the foundation for the post-close, 100-day plan.
- **AI product assessment:** Identify AI-enabled opportunities to enhance differentiation and improve enterprise value.
- **Execution readiness review:** Assess product management discipline, delivery capacity and governance maturity to ensure roadmap execution at scale.

Common client scenarios

Connecting product strategy to investment strategy

- **Pre-close:** We need to identify pre-investment risk areas and validate how the product capabilities and roadmap support the investment thesis
- **Post-close:** We're looking to prioritize product-led growth investments and align cross-functional initiatives foundational to the 100-day plan
- **Hold period:** We want to ensure product growth priorities are translated into actionable workstreams, partnering with portfolio operations to embed them into ongoing value creation initiatives
- **Exit preparation:** We need help to articulate the product value creation story and substantiate valuation multiples with data-driven evidence

Leaders



David Murray

Product diligence and value creation lead for clients; former PwC and EdTech product innovation leader



Peter Modica

Former global product executive turned PE advisor; specializes in product strategy and value creation acceleration

SMEs



Sean Everett

Strategic product executive and entrepreneur with expertise in product-led growth, innovation and private equity



Eileen Kim

Digital product executive with VP-level product management experience at Remitty, Tala and loanDepot

CROSSLAKE⁺

CASE STUDY

Where should you focus product efforts to capture new market segments?

Challenge

A growth-stage B2B SaaS company sought to validate expansion into the iPaaS mid-market and quantify the ROI of potential GTM and R&D investments.

Our approach

Crosslake assessed market needs, competitor positioning, and product readiness to identify high-return growth paths aligned with investment thesis.

Business outcome

The company avoided low-return initiatives, redirected R&D spend to higher-value opportunities, and improved investor confidence in the expansion thesis.



BUSINESS
PRODUCTIVITY
SOFTWARE



GLOBAL



\$23M+
ANNUAL
REVENUE



150+
EMPLOYEES