CROSSOVER RESEARCH

VOICE OF CUSTOMER INTELLIGENCE

The intelligence platform for private and public markets.

One shared engine that articulates the equity story, wins mandates, and underwrites the thesis. Built on accuracy and a verifiable track record.

$1B+ SINGLE DEAL OUTCOME	**80%** SELL-SIDE MANDATE WIN RATE	**80,000+** TECH-LEADER NETWORK	**100+** COMPLETED VOC STUDIES

TRUSTED BY LEADING FUNDS AND ADVISORS

General Atlantic · J.P.Morgan · Moelis · Francisco Partners · VPA · Rothschild & Co · Five Elms Capital · LeadEdge Capital · Battery · tidemark · Vector Capital

WHY WE BUILT THIS

As a partner at a firm serving more than 200 of the largest TMT hedge funds, I ran the research desk across a 750+ company coverage universe. That seat, plus three attempts to sell our own firm, taught me two things: **the truth lives with the customer, and the wrong owner can quietly unmake a great business.** Crossover is the platform we wish we'd had - independent, primary customer evidence, owned by the people making the decision.

At Crossover we love what we do and we do not like losing.

BRAD LYONS, FOUNDER · CROSSOVER RESEARCH

WHO WE SERVE · ONE ENGINE, EVERY SIDE OF THE DEAL

BANKERS

Win the mandate, carry it to close

Customer evidence no competing bank can replicate, at the pitch, in the CIM, and through diligence.

INVESTORS · PE / GE

Conviction before the teaser drops

Independent commercial diligence and thesis validation, sourced direct from the customer base.

PRIVATE CREDIT

Underwrite the downside

Independent customer evidence on retention and demand durability, to underwrite and monitor the credit.

PUBLIC EQUITY

Signal to position

Surface mispriced names early, then validate the thesis with primary customer evidence.

OPERATORS

Exit-ready, evidence in hand

Voice of Customer programs and value-creation inputs that make the equity story buyer-proof.

PROOF OF IMPACT

Neither party briefed the respondents. $1B+ followed.

On Nerdio, Crossover delivered one independent customer study to both sides of the table. **J.P. Morgan used it to win the exclusive sell-side mandate. General Atlantic used the same dataset to build conviction and invested $500M** at a unicorn valuation - credible to the buyer precisely because the seller's advisor did not author it.

SELL-SIDE ADVISOR J.P.Morgan LEAD INVESTOR GENERAL ATLANTIC

GenLogs
Battery · Led $60M Series B

Onebrief
Battery · Led Series C extension

Panopto
K1 · Acquired Peerceptiv and Elai

Spacelift
Five Elms · Led $51M Series C

Magma Math
Five Elms · Led $40M Series A

Nucleus Security
Delta-v · Led Series C

Red Canary
J.P. Morgan · $675M sale to Zscaler

MariaDB
K1 · Take-private acquisition

PUBLIC TRACK RECORD · 2023 Surfaced **Palantir at $11** and the **DRAM bull thesis**.

NEXT STEP

Get a free scoping call. We will outline a study for your next live decision in 24 hours.

Book a Meeting

CONTACT

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THE ARCHITECTURE NO COMPETITOR CAN REPLICATE

Not a better tool. A categorically different infrastructure, built over years and compounding with every engagement, measured against the alternatives your clients actually use.

Capability	CROSSOVER RESEARCH	Expert Networks, Consultants & AI Tools Tegus · GLG · Bain · McKinsey · AI diligence platforms	In-House Analysts Internal team
PROPRIETARY NETWORK	✓ Our own expert network: 80,000+ tech leaders and 16,000+ verified respondents, 600+ customer orgs per study via our research engine Cortex	◑ Rented access to a shared third-party roster or AI index	× No standing network; built by hand from CRM and cold outreach each time
NEGATIVE SIGNAL	✓ We select respondents to surface negative signal, including churned and lost accounts rosters never include	◑ Skews to current, willing users; churned customers leave nothing to index	◑ Independent, but bandwidth limits how many detractors get reached
EVIDENCE STANDARD	✓ Verbatim, every claim cited to a named customer conversation	× Anonymous notes; AI tools summarise and recombine, citing no named source	◑ Varies by analyst, typically summarised
DATA ACCESS	✓ You receive the raw underlying data cuts with respondent contact info, free to re-contact and audit any source	× Summary notes only, no way to re-contact; AI cites no source at all	◑ An internal deck; underlying data rarely shared or structured
STRUCTURED SCORING	✓ The Core 9 rubric scored on every respondent: NPS, retention, switching costs, expansion intent	× Qualitative call notes only; AI sentiment is not a rubric	◑ Custom per engagement, no consistent framework
TURNAROUND	✓ 2.5 weeks from kick-off to IC-ready deliverable	◑ 1-3 weeks for calls; AI is instant but unverifiable	× 6-12 weeks for comparable coverage
CROSS-STUDY BENCHMARKING	✓ Sector percentile rankings against 100+ completed studies	× No corpus; every engagement and every AI query starts from zero	× Knowledge lost at analyst turnover
COMPOUNDING VALUE	✓ Every study enriches all prior work. 950+ benchmarks and counting; each engagement is worth more than the last	× Resets every time; AI re-scrapes the same public web on each deal	× Resets at departure; no institutional memory

✓ Structural advantage ◑ Partial or conditional × Not available