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Robo Advisor Strategy for C6

Project Overview

C6, based in São Paulo, Brazil, is a startup digital bank without bank branches that intends to offer a full platform of financial services, including traditional daily banking services.

Our project was to help C6 Bank create a robo-advisory platform for customers. We hoped to develop a business plan and implementation roadmap for a Robo-advisor product in Brazil, starting from a minimum viable product (MVP).

Approach

- 1 Understand the Brazilian Investor
- 2 Analyze the robo-advisory space in the US and in Brazil
- 3 Determine key features needed for C6's robo-advisor
- 4 Develop robo MVP, create business plan and implementation roadmap

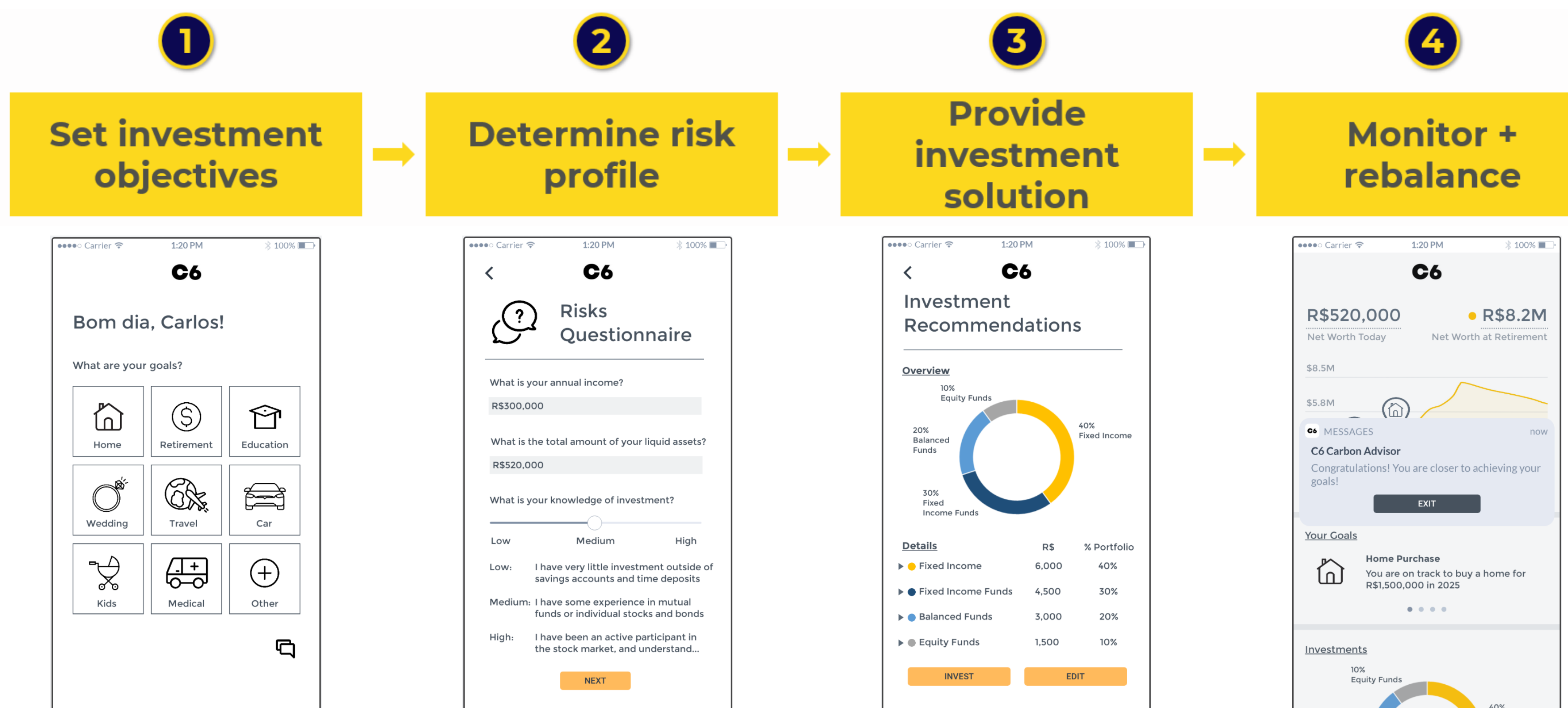
Recommendation

Target Customer

C6 Robo-advisory platform should target **Middle-Income** Customers

- with disposable assets to invest, having little or no financial knowledge
- looking for **Low-cost, Customized, Transparent** and **Easy-to use** investment advisory services

Customer journey and process flow with mock screens



Key features

Simplicity

Accessibility

Goal-based

Tiered-offering

Hybrid Model

Integration