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

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