

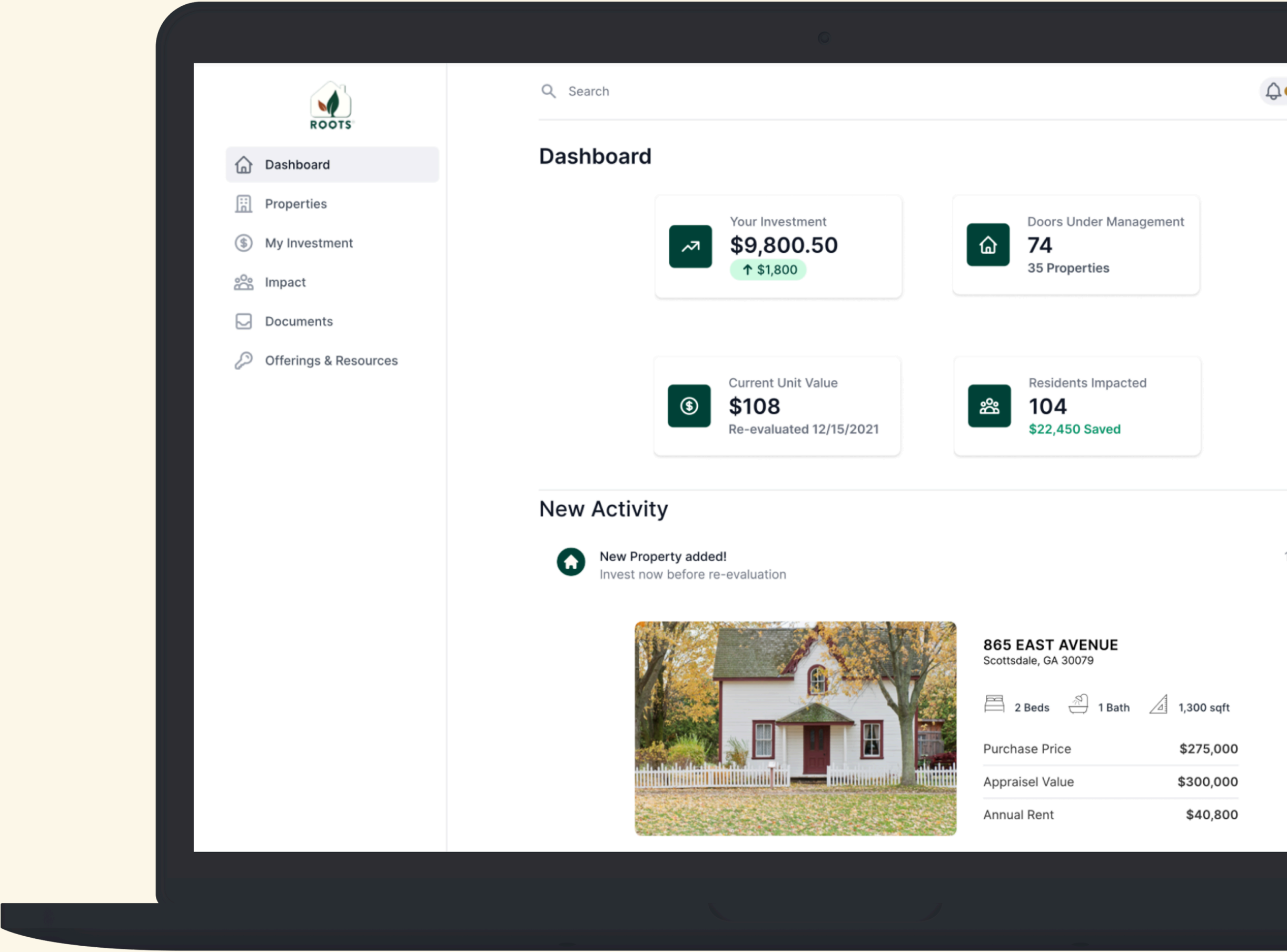
ROOTS MVP Case Study

Research, Strategy, and Product Direction



Fintech platform focused on impact investing.

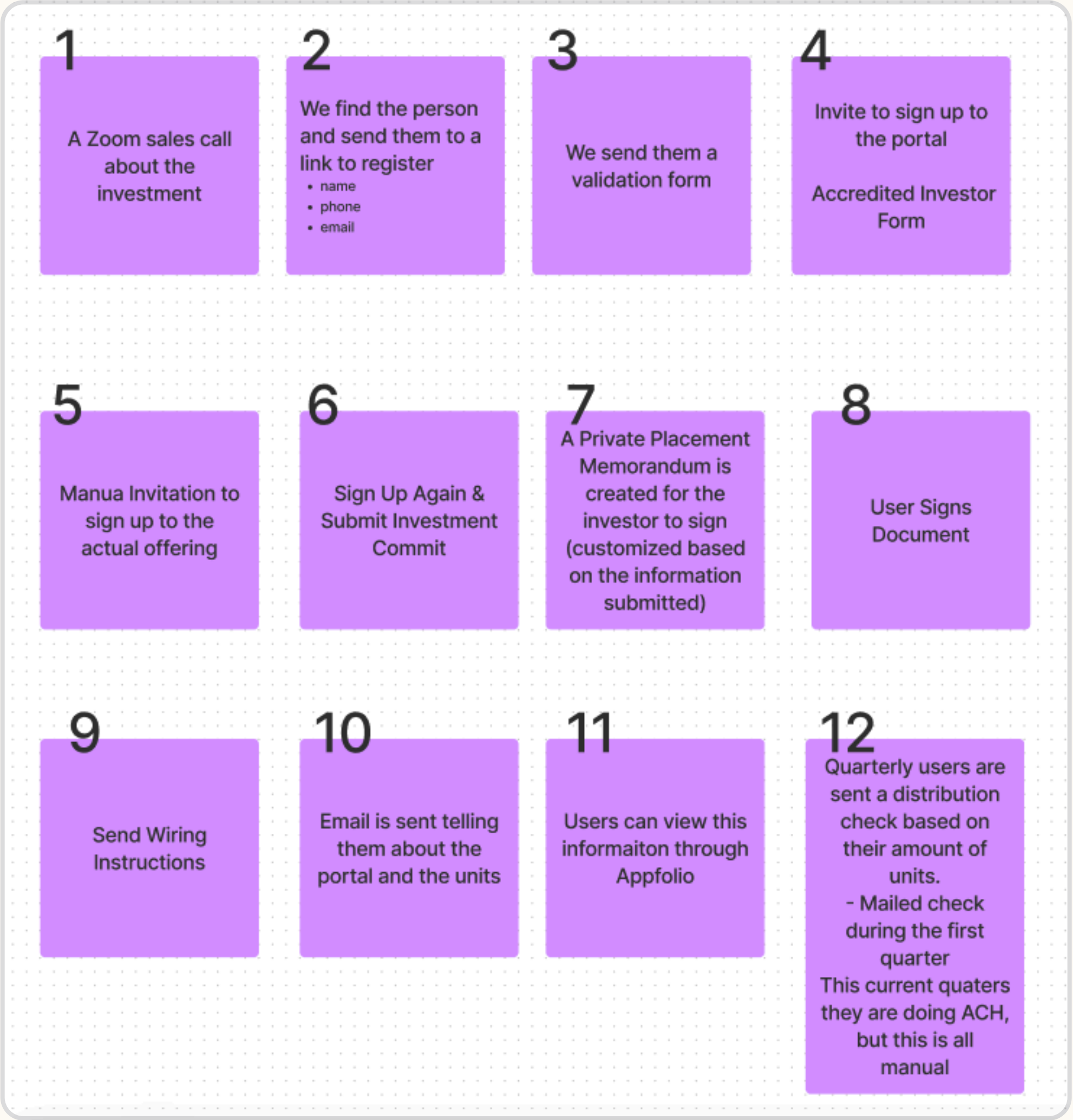
ROOTS was an early-stage fintech platform focused on impact investing, initially serving accredited investors with a long-term vision of broader accessibility.



Can we support community engagement while simplifying
investor onboarding?

Current State Reality

A largely manual, multi-step investor process supported through emails, forms, and back-and-forth coordination.



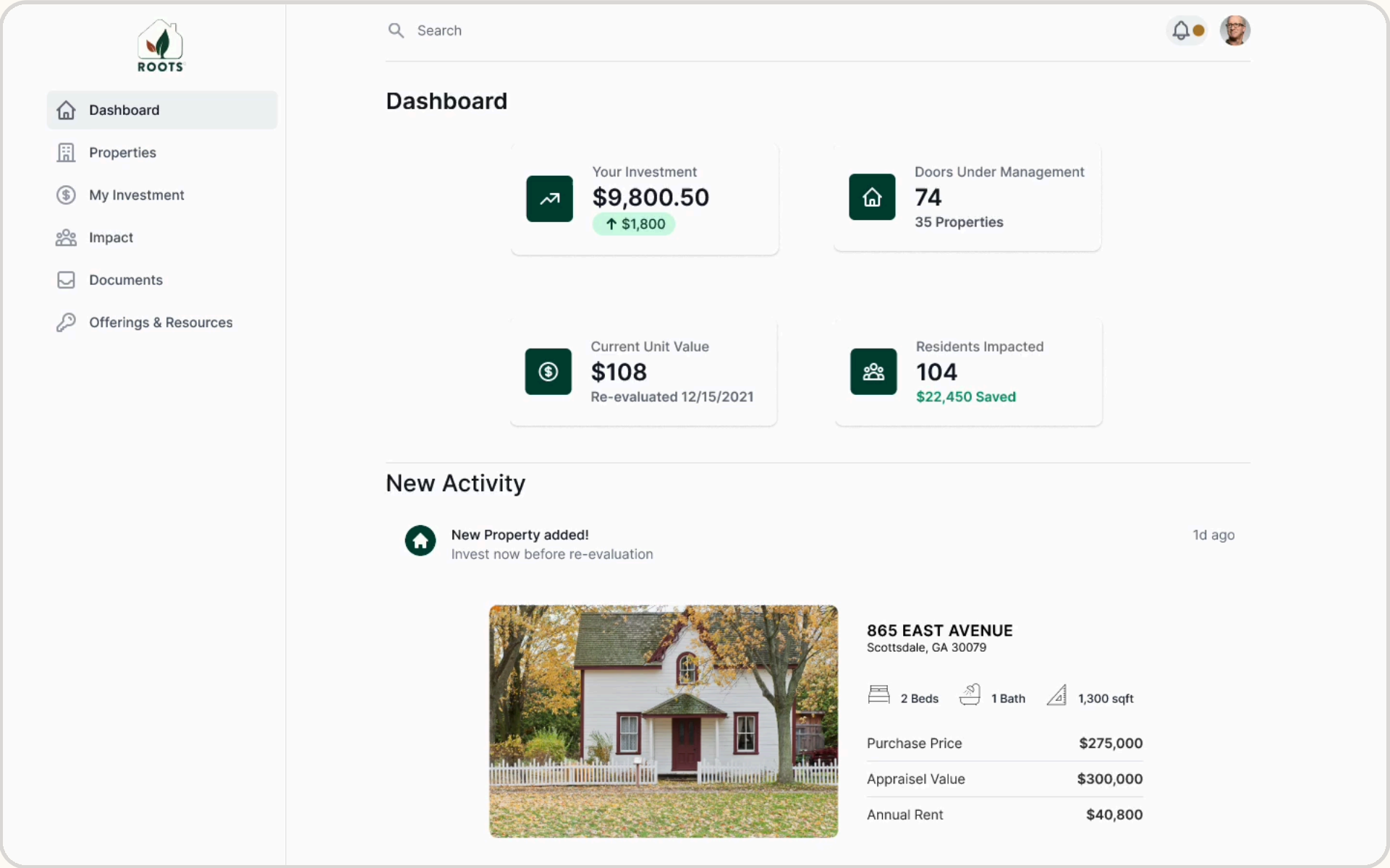
Research Framing & Goals

Align on the current state, business goals, and key risks, then validate engagement and onboarding flows through user testing to inform a prioritized product roadmap.

The goal was to identify which engagement and onboarding elements were essential for an MVP, and which could be deferred.

Research Approach

Stakeholder alignment followed by rapid user testing of a prototyped end-to-end investment experience.



Key Insights

User testing revealed clear priorities around information sequencing and perceived value.

1. Financial clarity needed to come before impact storytelling.
2. Portfolio-level impact mattered more than individual resident highlights.
3. Engagement was meaningful when tied to growth and momentum.
4. Clear sequencing of information supported faster, more confident decisions.

Strategic Pivot & Product Direction

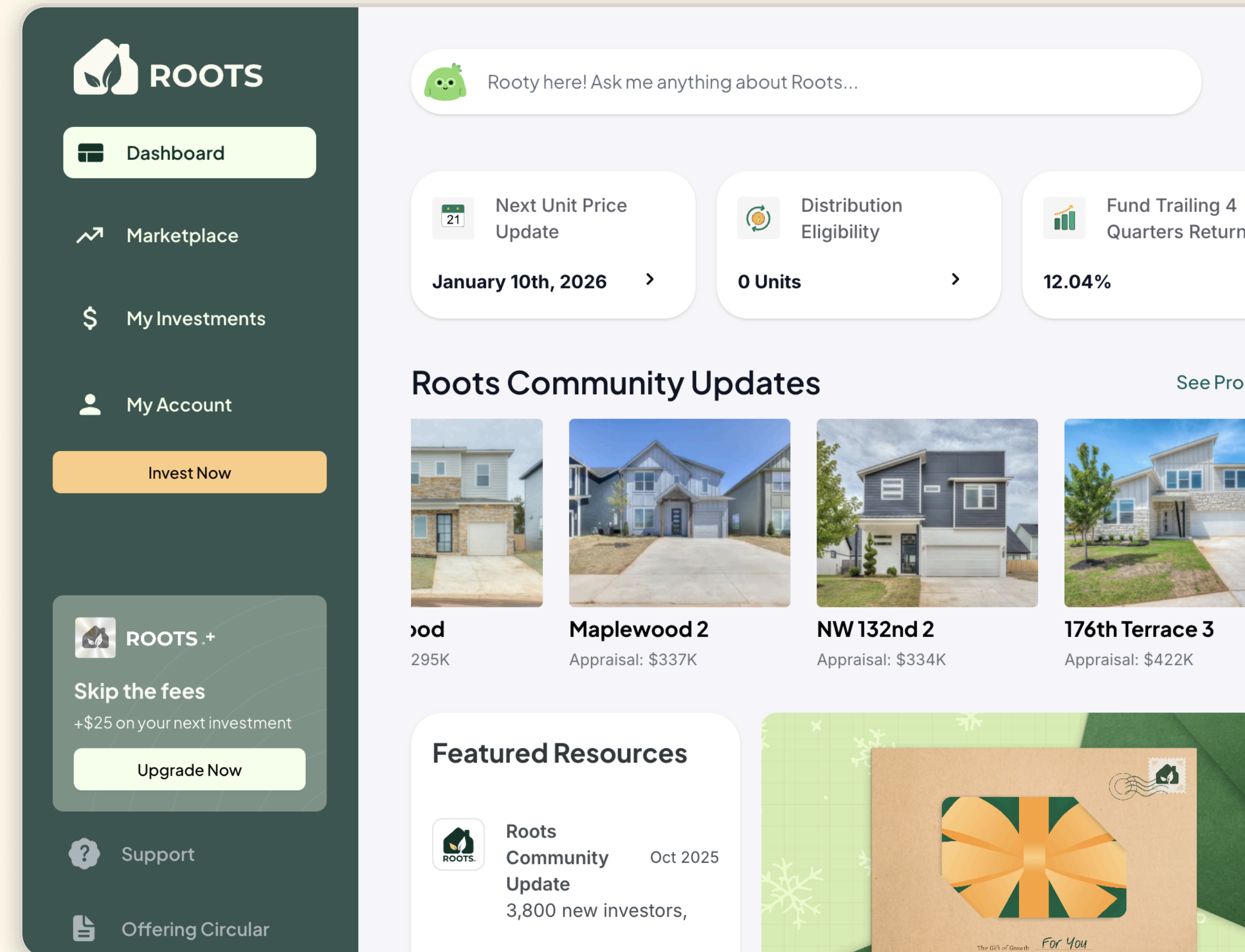
Refocus the MVP around decision-critical information and portfolio-level impact, with engagement layered intentionally over time.

Outcomes & Impact

Prevented unnecessary engineering investment by validating feature priorities early and producing a focused, research-backed roadmap.

Significantly reduced manual investor onboarding effort by clarifying MVP scope and streamlining the end-to-end flow.

Established the foundation for ROOTS' current platform, which today serves 20,500 investors and has facilitated \$81M+ in investments.



Reflections on Research-Led Strategy

- Early alignment sharpens research and speeds decisions
- Sequencing matters as much as feature selection
- Testing direction early prevents unnecessary build
- Research is most valuable when it informs tradeoffs

Thank you.