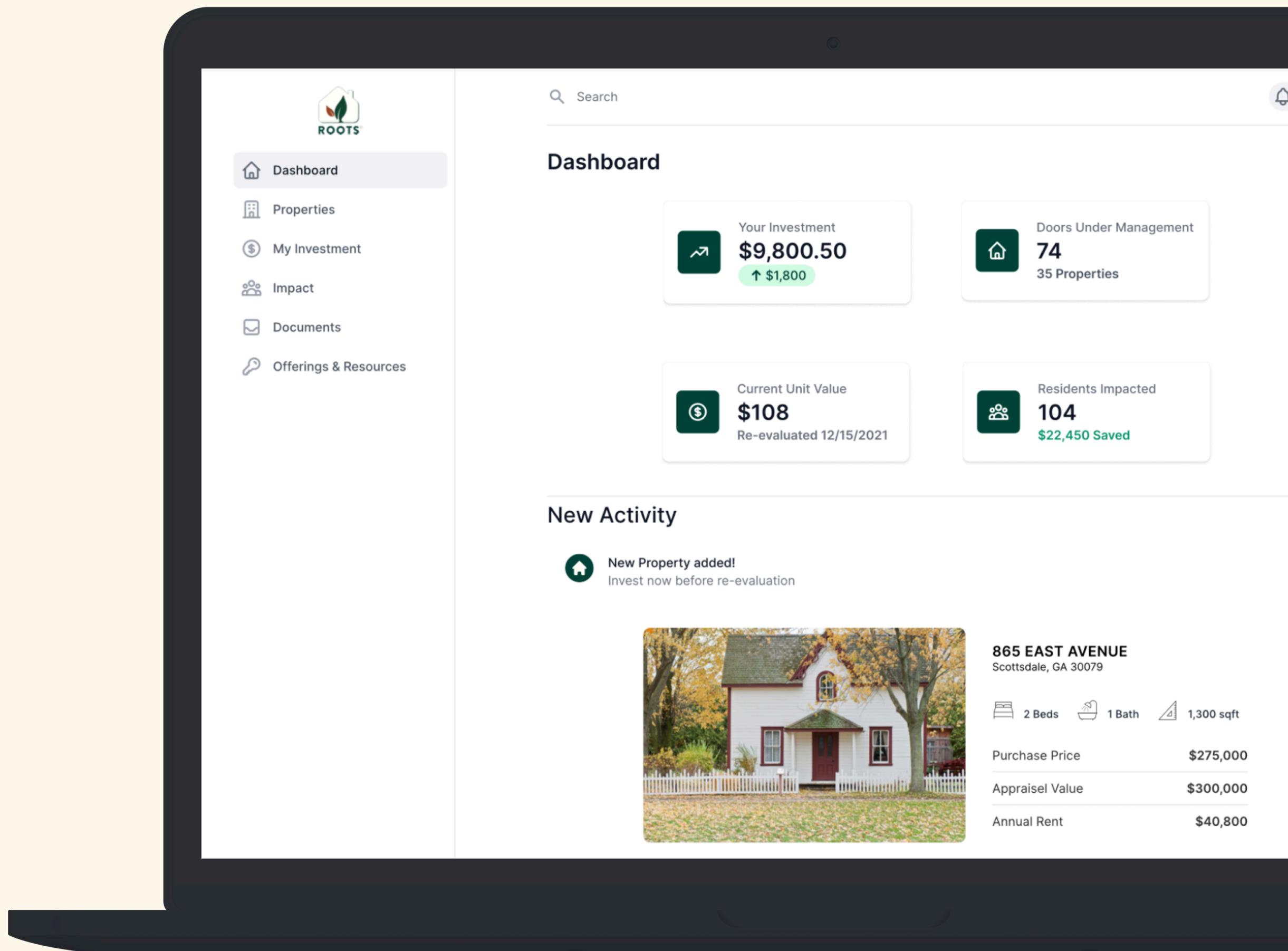


ROOTS MVP Case Study

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.



The screenshot shows the ROOTS fintech platform's dashboard. The left sidebar features a logo with a stylized tree and the word 'ROOTS'. The navigation menu includes 'Dashboard' (selected), 'Properties', 'My Investment', 'Impact', 'Documents', and 'Offerings & Resources'. The main content area is titled 'Dashboard' and displays several key metrics: 'Your Investment' is \$9,800.50, up \$1,800; 'Current Unit Value' is \$108, re-evaluated 12/15/2021; 'Doors Under Management' is 74, 35 Properties; and 'Residents Impacted' is 104, with \$22,450 Saved. Below these metrics is a section titled 'New Activity' with a message: 'New Property added! Invest now before re-evaluation'. A thumbnail image of a two-story house with a red door and a white picket fence is shown, with the address '865 EAST AVENUE' and location 'Scottsdale, GA 30079'. Below the image, property details are listed: '2 Beds', '1 Bath', '1,300 sqft', 'Purchase Price \$275,000', 'Appraisal Value \$300,000', and 'Annual Rent \$40,800'.

Dashboard

Search

Dashboard

Your Investment
\$9,800.50
↑ \$1,800

Doors Under Management
74
35 Properties

Current Unit Value
\$108
Re-evaluated 12/15/2021

Residents Impacted
104
\$22,450 Saved

New Activity

New Property added!
Invest now before re-evaluation

865 EAST AVENUE
Scottsdale, GA 30079

2 Beds 1 Bath 1,300 sqft

Purchase Price \$275,000

Appraisal Value \$300,000

Annual Rent \$40,800

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.



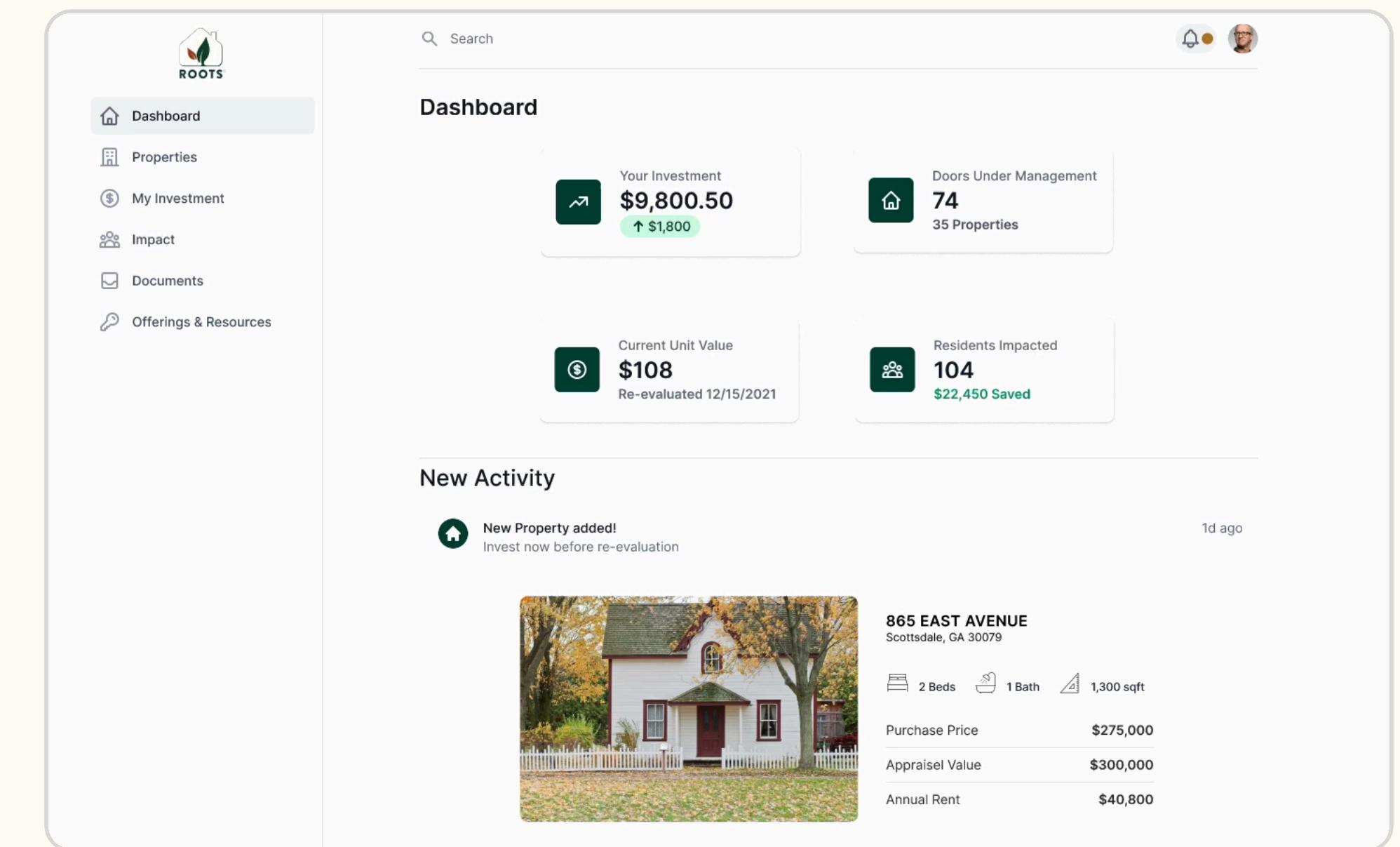
Research Framing & Goals

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.



The image shows a screenshot of the Roots investment platform. The left side features a sidebar with a house icon and the word 'ROOTS' at the top, followed by a list of navigation items: Dashboard (selected), Properties, My Investment, Impact, Documents, and Offerings & Resources. The main content area is the 'Dashboard', which includes a search bar at the top right. Below the search bar are four cards: 'Your Investment' (\$9,800.50, up \$1,800), 'Doors Under Management' (74, 35 Properties), 'Current Unit Value' (\$108, Re-evaluated 12/15/2021), and 'Residents Impacted' (104, \$22,450 Saved). At the bottom, there is a 'New Activity' section with a message: 'New Property added! Invest now before re-evaluation' (1d ago). Below this is a property listing for '865 EAST AVENUE' in Scottsdale, GA 30079, featuring a photo of a white house with a red door, 2 beds, 1 bath, 1,300 sqft, a purchase price of \$275,000, an appraisal value of \$300,000, and an annual rent of \$40,800.

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.

The image shows a screenshot of the Roots platform. The left side features a dark green sidebar with the Roots logo, a 'Dashboard' button, 'Marketplace', 'My Investments', 'My Account', and an 'Invest Now' button. Below this is a 'ROOTS +' section with a 'Skip the fees' offer of +\$25 on the next investment, an 'Upgrade Now' button, 'Support', and 'Offering Circular'. The right side has a white header with a green 'Rooty' icon and the text 'Rooty here! Ask me anything about Roots...'. Below this are three cards: 'Next Unit Price Update' (January 10th, 2026), 'Distribution Eligibility' (0 Units), and 'Fund Trailing 4 Quarters Return' (12.04%). A 'Roots Community Updates' section shows four property images: 'Rod' (295K, Appraisal: \$337K), 'Maplewood 2' (Appraisal: \$334K), 'NW 132nd 2' (Appraisal: \$422K), and '176th Terrace 3' (Appraisal: \$422K). A 'Featured Resources' section includes a 'Roots Community Update' card for Oct 2025, showing 3,800 new investors, and a 'For You' section with a green and orange graphic.

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.