

MVP 3-Month Product Roadmap

	Goals	Outcomes	Key Results	KPI's	Costs
Month 1	<p>Planning and Initial Development</p> <p>“You were born to win!”</p>	<p>Define and finalize the MVP features based on the business case and user requirements</p> <p>Set up the development environment and tools.</p> <p>Begin development of core functionalities.</p>	<p>Completed project plan with roles and responsibilities.</p> <p>Development environment operational</p> <p>Initial UI mockups and basic back-end functionalities.</p>	<p>Percentage of development setup completed.</p> <p>Number of initial core features developed.</p>	<p>Initial setup costs including software licenses and development tools.</p>
Month 2	<p>Core Development and Content Creation</p> <p>“Do it now!”</p>	<p>Develop investment analysis logic.</p> <p>Create basic portfolio options and reasoning logic</p> <p>Develop content for educational materials.</p>	<p>Core functionalities for investment recommendations.</p> <p>Educational content available.</p>	<p>Number of portfolio options available.</p> <p>Number of educational articles and videos created.</p>	<p>Development costs based on hours spent.</p> <p>Content creation costs.</p>
Month 3	<p>Testing, Refinement, and Launch Preparation</p> <p>“Get to Da Choppa”</p>	<p>Conduct thorough testing of the MVP.</p> <p>Refine the product based on feedback.</p> <p>Develop support processes and training materials.</p>	<p>Fully functional MVP ready for launch.</p> <p>Support and training infrastructure in place.</p>	<p>Number of bugs identified and resolved.</p> <p>User satisfaction rate from initial testing.</p>	<p>Costs associated with final testing and refinements.</p> <p>Training and support setup costs.</p>

Additional Considerations

Establish a support system via FAQ section, blogs, tutorials and email to handle user inquiries and issues.

Ensure all features comply with financial regulatory standards applicable to investment advice software. This includes preparing documentation and processes for regulatory review, if required.

Integrate a secure, third-party payment processor to handle investments without direct bank linking, ensuring compliance with PCI DSS and other relevant financial security standards.

3-Year Feature Roadmap for Full Product Development

Now (Product Launch and Market Penetration) - Year 1

Features

- Launch MVP with core budgeting and basic investment features.
- Gather user feedback and conduct continuous performance monitoring.
- Implement basic customer support and educational resources.

Goals

- Successfully introduce the product to the market.
- Establish a baseline for product performance, feedback loops and user satisfaction.

Next (Expansion and Enhancement) - Year 2

Features

- Expand investment options and portfolio customization.
- Enhance AI capabilities for more personalized financial advice.
- Develop and integrate more comprehensive educational content and interactive tools.
- Begin international expansion in selected markets.
- Auto draft for seeding from bank accounts

Goals

- Broaden the product's appeal and usability.
- Increase personalization to improve user retention and satisfaction.
- Start scaling the product to new markets.

Later (Consolidation, Simplification and Advanced Features) - Year 3

Features

- Introduce advanced financial planning tools, such as retirement planning and tax optimization.
- Expand the AI's capability to include predictive analytics for financial health monitoring. [bi-weekly/monthly]
- Fully integrate with banking and financial services for seamless user experience.
- Establish partnerships with major financial institutions.
- Refine and streamline the user experience to be as straightforward and conversational as possible, aiming for a seamless "single-click" interaction.

Goals

- Position the product as a budget-driven financial management tool.
- Leverage advanced technology to offer predictive and highly personalized financial advice based on customers budget constraints and risk tolerance.
- Achieve significant market presence and influence.