

Assessment of Adoption and Business Impact for Golden Thematic Product



SwissBorg

The Golden Thematic product was introduced to provide users with an innovative investment opportunity, enhancing their overall experience on the SwissBorg platform. To evaluate its success, we have identified several metrics that measure adoption, engagement, business impact and risk mitigation.

Key Metrics and Targets

These are the main metrics that can be used to analyze how the product is performing and how our customers are experiencing it.

Every number under pessimistic/realistic/optimistic categories are an estimation and should be reviewed with the business team to match real business expectations.

Adoption Metrics

Users Engagement

How many distinct users are using the product?

Scenario	Expectation
Pessimistic	500 users in the first month
Realistic	1,000 users in the first month
Optimistic	2,000 users in the first month

Frequency of Users Transactions

How many transactions are users doing?

Scenario	Expectation
Pessimistic	1 transaction per user per month
Realistic	2 transactions per user per month
Optimistic	3 transactions per user per month

Engagement Metrics

Average Transaction Volume per User

How much are users transacting?

Scenario	Expectation
Pessimistic	\$100 per user per month
Realistic	\$250 per user per month
Optimistic	\$500 per user per month

Retention Rate of Users

How many users remain engaged after the 3rd month?

Scenario	Expectation
Pessimistic	50% retention after 3 months
Realistic	60% retention after 3 months
Optimistic	70% retention after 3 months

Business Impact Metrics

Revenue Generated

How much is the total revenue generated from transactions related to the product in the first quarter?

Scenario	Expectation
Pessimistic	\$50,000 in the first quarter
Realistic	\$100,000 in the first quarter
Optimistic	\$200,000 in the first quarter

Impact on Overall Trading Volume

How is the product contributing to the increase of the platform trading volume?

Scenario	Expectation
Pessimistic	5% increase in total trading volume
Realistic	10% increase in total trading volume
Optimistic	20% increase in total trading volume

Customer Lifetime Value (CLV)

How much is the expected long-term profitability per user?

Scenario	Expectation
Pessimistic	\$500 per user
Realistic	\$1,000 per user
Optimistic	\$2,000 per user

Risk Mitigation Metrics

Churn Rate of Users Dissatisfied

How many users have disengaged or left the platform due to dissatisfaction with the product?

Scenario	Expectation
Pessimistic	Less than 10% churn rate
Realistic	Less than 5% churn rate
Optimistic	Less than 3% churn rate

Ongoing Improvements

Implement targeted marketing campaigns to promote awareness and adoption of the Golden Thematic product.

Enhance user education and support to ensure a seamless onboarding experience and maximize user satisfaction.

Collaborate with the product development team to introduce new features and enhancements based on user feedback and market demand.

Conduct regular surveys and aim for a satisfaction score of 4 out of 5.

Next Steps

Team	Action
Business/Marketing and Data Team	Bi-weekly review meetings to track progress against defined metrics and targets.
Data Team	Conduct in-depth analyses to identify drivers of success and areas for improvement.
UX Team	Iterate and optimize strategies based on insights gathered from data analysis and user feedback.

If you have any questions or require further clarification on any aspect of this report, please do not hesitate to contact me.

Regards,

Vinicius Raphael

Data Analyst, SwissBorg