

WELCOME TO

BREX





# OVERVIEW

Brex is a U.S.-based financial technology company founded in 2017 by Brazilian entrepreneurs Pedro Franceschi and Henrique Dubugras. It specializes in offering financial products tailored for startups, e-commerce brands, life sciences companies, and venture-backed businesses.

Brex has redefined financial operations for high-growth companies by combining business credit cards, cash management, spend controls, and financial software in a single integrated platform. Its hands-off approval process, software features, and tailored approach have made it one of the most prominent fintech partners for U.S. startups and venture-backed companies.

# THING TO BE IMPLEMENTED

## 1. Customized Push Notification:-

This will help the user to set a particular notification type to receive and save from notification cluster.



## 2. Raise Ticket:-

Due to lack of customer service with this the AI will first automate and if issue not solved the customer support executive. And also some basic most asking problem answer like chatbot

## 13. Two Factor authentication:-

Due to lack of security this will add an extra layer of security.

## 14. High Cash Burn

### Solution:

Cut back on non-core projects. Focus on profitable enterprise and venture-backed clients. Offer paid premium features (advanced analytics, faster payments, dedicated support).



# AIM



## AIM 01

### 1. Customized Push Notifications

Revenue Generation: \$2,000,000 annually

ROI: 2,533.3%

Key Benefits: 31% conversion rate improvement, 15% customer retention boost

Justification: Fintech push notifications achieve 72.3% opt-in rates and can increase app engagement.

## AIM 02

### 2. AI-Powered Customer Support (Raise Ticket System)

Revenue Generation: \$1,500,000 annually (primarily through cost savings)

ROI: 440.0%

Key Benefits: 30-40% reduction in support costs, 25% customer retention improvement

Justification: Automated customer support can reduce costs by 30-40% while handling 40% .

## AIM 03

### 3. Two-Factor Authentication (2FA)

Revenue Generation: \$800,000 annually

ROI: 670.0%

Key Benefits: Reduced fraud losses, enhanced security trust, 10% customer retention improvement

Justification: 2FA significantly reduces security breach risks (average breach cost: \$4.24

## AIM 04

### 4. Premium Features for High Cash Burn Solution

Revenue Generation: \$5,000,000 annually

ROI: 860.0%

Key Benefits: Advanced analytics, faster payments, dedicated support, 20% customer

## STRATEGIC BENEFITS BEYOND FINANCIAL RETURNS

VISION



### VISION 01

#### 1. Competitive Positioning

Market Leadership: Enhanced security and user experience differentiation

Enterprise Appeal: Premium features attract higher-value customers

Customer Stickiness: Improved retention reduces acquisition costs

### VISION 02

#### 2. Operational Excellence

Scalability: Automated support handles growth without proportional cost increases

Efficiency: Push notifications and 2FA reduce manual processes

Risk Mitigation: Enhanced security reduces fraud and compliance risks

### VISION 03

#### 3. IPO Readiness

Profitability Achievement: Immediate path to positive cash flow

Revenue Diversification: Multiple revenue streams reduce dependency risks

Growth Trajectory: Strong metrics support higher valuation multiples

# ROADMAP

## Immediate Actions (0-3 months)

1. Secure Budget Approval: \$925,000 implementation budget
2. Prioritize Development: Begin with Push Notifications (highest ROI)
3. Assemble Team: Dedicated project team for parallel development

## Short-term Implementation (3-12 months)

1. Phase 1: Push Notifications and 2FA (security foundation)
2. Phase 2: AI Customer Support integration
3. Phase 3: Premium features rollout

## Long-term Strategy (12+ months)

1. Monitor Performance: Track ROI metrics against projections
2. Optimize Features: Continuous improvement based on user feedback
3. Scale Success: Expand successful features to international markets

# THANK YOU

