OVERVIEW

About ZERODHA

Indian stockbroker and financial services company. Known for its disruptive pricing models and technology-driven approach, it's the largest retail stockbroker in India by active client base

About ZERODHA VARSITY

Comprehensive online platform that offers free, in-depth education on the stock market and personal finance. Created by Zerodha, India's largest stockbroker, Varsity aims to democratize financial knowledge

Products

Kite	Varsity	Coin

Competitors

Brokerage Firms	YouTube channels	Portals

PROBLEM STATEMENT

As Chief Product officer, launch Zerodha Varsity as app aimed at new stock traders

Problem

Limited marketing budgets

Leverage existing Zerodha resources & brand equity

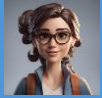Focus on attracting new users to Zerodha Platform

Solution

Affiliate Marketing

Improve product features and incentives

Partnerships

USER PERSONAS

Ankita

21 years | Student | Finance newbie

With minimal or no income, build a good portfolio for long term returns &

Needs: Clear & concise concepts covering all topics in stock market and finance, a community to interact

Challenges: Lack of consistency across app & mobile, Lack of portal to implement concepts without real money, lack of community in real world

Mohit

25 years | Software Engineer | Aspiring investor & trader

With minimal or no income, build a good portfolio for long term returns &

Needs: Dedicated tracks to learn about investing, trading, engaging platform

Challenges: Lack of incentive to stick with learning platform

"The number of Demat accounts has skyrocketed from about 4 crore in March 2020 to approximately 14 crore in 2024. This means over **10 crore new investors** have joined the wealth creation journey in India. Retail investors have not only expanded the investor base but also provided a strong foundation for the market"

"As per reports, it is stated that India only consists of **27% of the population** that falls into the category of "**financially literate**""

Solutions - PARTNERSHIPS (1/2)

Zerodha Varsity will establish strategic partnerships with educational institutions to integrate financial education into the mainstream curriculum. This involves collaborating with schools, colleges, and universities to develop joint programs, curriculum integration, and student engagement initiatives.

Tie up with Schools, colleges, placement committees → **Choose student ambassadors** → **Conduct events, AMAs** → **Incentives to join Zerodha and Certification**

Value to Customers

- **Enhanced Learning Experience:** Students benefit from a holistic learning experience

- **Industry Exposure:** Access to industry experts and real-world insights
- **Career Opportunities:** Increased chances of securing internships and placements through Zerodha's network.
- **Certification Recognition:** Industry-recognized certifications to boost employability

Value to Company

- **Increased outreach**: Partnerships can help Zerodha Varsity tap into new geographical markets and demographics, broadening its user base
- **Increased user acquisition**: Joint marketing initiatives and referral programs can drive new user acquisition through partner networks
- **New Advocates**: Satisfied partners and their customers can become advocates, spreading positive word-of-mouth about the platform

Pitfalls

- **Internal Resource constraints**: Insufficient resources can hinder partnership management.
- **Content strategy**: Lack of engaging content and content delivery can hamper the progress

Success Metrics

- **Number of Student Chapters vs No of User signups** : Effective conversion rate per student chapter

- **Chapters vs certificates completed** : Effective user engagement per student chapter

Solutions - GAMIFICATION (2/2)

Zerodha Varsity and Zerodha should establish a gamified version of learning to keep users and learners engaged. This should be done via introducing monthly challenges and virtual trading platform where learners can compete and apply the concepts, they have learnt without involving real money.

Introduce Kite Virtual → **Launch Monthly Challenges** → **Reward Challenge winners with more Virtual Money and Kite Rewards**

Value to Customers

- **Enhanced engagement:** Gamification can transform learning from a passive activity to an interactive and enjoyable experience.
- **Practical application:** Virtual trading allows learners to apply theoretical knowledge in a risk-free environment, building confidence.
- **Fun and rewarding:** Challenges, rewards, and badges can motivate learners to progress and achieve milestones.

Value to Company

- **Increased user acquisition and retention:** Gamification can attract a wider audience and encourage existing users to spend more time on the platform
- **Potential revenue generation:** While the core platform remains free, gamification elements like premium features or virtual currency could generate revenue

Pitfalls

- **Technical complexity:** Developing a robust virtual trading platform with real-time market data integration can be challenging.
- **Content building** – Keeping the challenges attractive enough over course of time

Success Metrics

- **Conversion to real trading:** Tracking the number of users who transition from virtual to real trading
- **User engagement:** Increased time spent on the platform, completion rates of courses, and frequency of logins

Prioritisation

	Reach	Impact	Confidence	Effort	
Partnerships	8	7	8	8	**= 56**
Gamification	9	8	8	7	**= 82**

GTM - PARTNERSHIPS (1/3)

Pre Launch

- **Identify and Profile Potential Partners:** Conduct a thorough analysis of potential partners based on their target audience, brand alignment, and willingness to collaborate.
- **Develop Partnership Framework:** Create a clear framework outlining the types of partnerships, benefits for partners, and key performance indicators (KPIs).
- **Build Internal Capabilities:** Establish a dedicated partnership team with the necessary skills to manage relationships and execute partnerships effectively.

Launch

- **Announce Partnership Program:** Create a strong launch campaign to generate interest among potential partners and highlight the benefits of collaborating with Zerodha Varsity.
- **Onboard Initial Partners:** Focus on securing partnerships with high-impact partners to establish credibility and generate early momentum.
- **Develop Joint Marketing Plans:** Collaborate with partners to create integrated marketing campaigns that leverage both brands' strengths.

Post Launch

- **Expand Partnership Network:** Continuously identify and onboard new partners to increase reach and diversify revenue streams.
- **Optimize Partnership Performance:** Analyze partnership data to identify opportunities for improvement and maximize ROI.
- **Measure and Report Impact:** Track key performance indicators to demonstrate the value of the partnership program to internal stakeholders and partners.

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Launch

- **Integrate gamification seamlessly into the platform:** Ensure smooth user experience by embedding game elements within the existing Varsity interface.
- **Create a buzz around the launch:** Utilize social media, email marketing, and in-app notifications to generate excitement and anticipation.
- **Offer incentives for early adopters:** Provide exclusive rewards or benefits to encourage initial participation and build a strong user base

Post Launch

- **Track user behavior and performance metrics:** Analyze user data to identify successful game elements and areas for improvement.
- **Continuously update and enhance the gamification experience:** Introduce new challenges, rewards, and features to maintain user engagement and motivation.
- **Leverage user-generated content:** Encourage users to share their achievements and experiences to create a sense of community and foster organic growth.

Thank You !

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