



GOLDEN GATE DOULA ASSOCIATES

BUSINESS MODELS FINAL REPORT

MAY 2019

PREPARED BY

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The purpose of this report is to equip stakeholders of **Golden Gate Doula Associates (GGDA)** with recommendations for improvements in the current business model. As well as aid in decisioning around operational best practices, customer acquisition and retention and brand continuity.

It is important to note that all recommendations listed herein are focused on process improvement and clarifying business objectives and customer value propositions. It is the view of this team that GGDA has the ability to provide strong value proposition to their clientele with the addition of organization, clearly communicated values, brand clarity and better line of sight into business operations and health.

Until GGDA is able to pull their affairs in order, some of the suggested business models will not be viable. However, we have offered a series of recommended steps to bring GGDA closer to operational health and prepare them to grow their business. Offered in greater detail within the report, it is the recommendation of this team that Jennifer Darwin, owner of GGDA, focus first on getting business finances in order with a strong financial tracking system, bring on a general manager and hire doulas, currently independent contractors, as full-time employees.



“A **business model** describes how your company creates, delivers and captures value.”

THE TEAM

MEET THE DEDICATED CONSULTING TEAM MEMBERS & GGDA BUSINESS MODEL DOULAS.



VIANKA ALORAS

With an inquisitive spirit and holistic approach, Vianka is a creative ready to serve the future of humanity. Inspired by family oriented and health care experiences, she is motivated by businesses that cater to these industries. She enjoys identifying how to help them gain continued success. She currently works as a UX researcher with the FAA working on developing a new medical certification system.



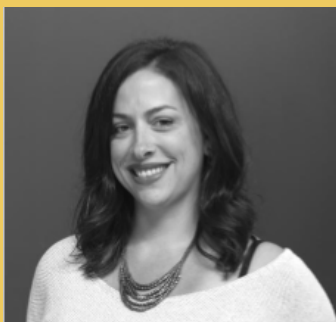
LIBERTY KIKERPILL

Born one of nine children (all delivered naturally), Liberty has always loved and been surrounded by children. She and her mother were spokespersons for “Wear your Baby,” by Dr. Sears. She has spent her career learning the customer experience. She currently works for Apple and in her free time is developing a children’s product.



MAREN LINN

Maren is a full time mother of three who is simultaneously engrossed in crafting a new business that reimagines what a nursing bra should be. Hell-bent on improving the experience of new moms, Maren has extensive personal experience being a pregnant lady and baby juggler and is passionate about social entrepreneurship, design strategy, and workplace equality.



NELLY WOLLENBERG

Nelly loves bringing people together from different backgrounds, roles and organizations to make communities better through design. Born and raised in Los Angeles, she spent much of her childhood visiting her RNC mother on the Labor and Delivery ward of LA County/USC Women’s Hospital. It was then that she gained an early appreciation for the power of women in childbirth.

BUSINESS MODEL BABY

HOW WE WORKED WITH THE CLIENT AND UNFOLDING OUR BUSINESS MODEL BABY'S BIRTH STORY.



Falling in love

Meeting the client & learning the business



1st Trimester

Learn the Client's Objectives & Strategize



2nd Trimester

Focus on the Business Model Canvas & One Page Business Plan



3rd Trimester

Business Strategy



Postpartum

The Future of the Business



FALLING IN LOVE

Team met Jennifer on January 16, 2019 at her brick and mortar location located in Lower Haight Neighborhood in San Francisco, California.

Jennifer gave us a tour of her doula space (which includes studio space for yoga and classes, apothecary kitchen, room for the doula's to rest, massage room, and counseling room)



**Jennifer shared her story and big dreams:**

She started as a Labor and Delivery nurse in Dallas, Texas. She has attended over **1,000 births** as a nurse and birth doula. Once you arrive at the hospital, she will help you get settled in and work with the staff to make sure your birth preferences are communicated.

Additional Education: Maternal Nutrition, Breast Feeding, Advanced Maternal Age risks, and medications that are used in the delivery room.

Jennifer is a proud mother of a 24 year old daughter who she breastfed until she was 18 months old. Jennifer is the **Founder of the GGDA** and teaches Infant Safety and CPR.

"IT IS IMPORTANT FOR YOU TO KNOW & FEEL COMFORTABLE WITH YOUR OPTIONS ALONG THE WAY TO MAKE SAFE AND EDUCATED DECISIONS."

Jennifer kept trying to **help advocate for women** and felt restricted by the hospital. With her background as a nurse and passion for birth coaching she decided to take a big step into starting a business.

She purchased the rights to all the documents and forms through a similar Doula group located in Dallas, Texas and started her own doula business in San Francisco.

Meeting Team takeaway

Business operations were our first concern, (no bookkeeping or expense systems, no insurance, old website still live...) but we were inspired by the passion behind the services offered by Golden Gate Doula Associates

VALUE PROPOSITION

Golden Gate Doula Associates offers emotional and physical support to expectant and new parents. Jennifer's business is divided into prenatal and postpartum doulas. **Parents (clients)** often want one or the other, some use both services. Prenatal and Postpartum have similar pains and gains but different jobs to be done.

Prenatal focuses on educating and developing a birth plan which eases the fears and lack of control feelings of the clients

Postpartum focuses on how to care for a newborn (lactation, sleep, etc), and helps the parents rest and rejuvenate.





BIRTH DOULA SERVICES

Like most of the other doulas we looked into, this service is offered as a package, with two prenatal home visits, support in the hospital during the birth and one postpartum checkup.

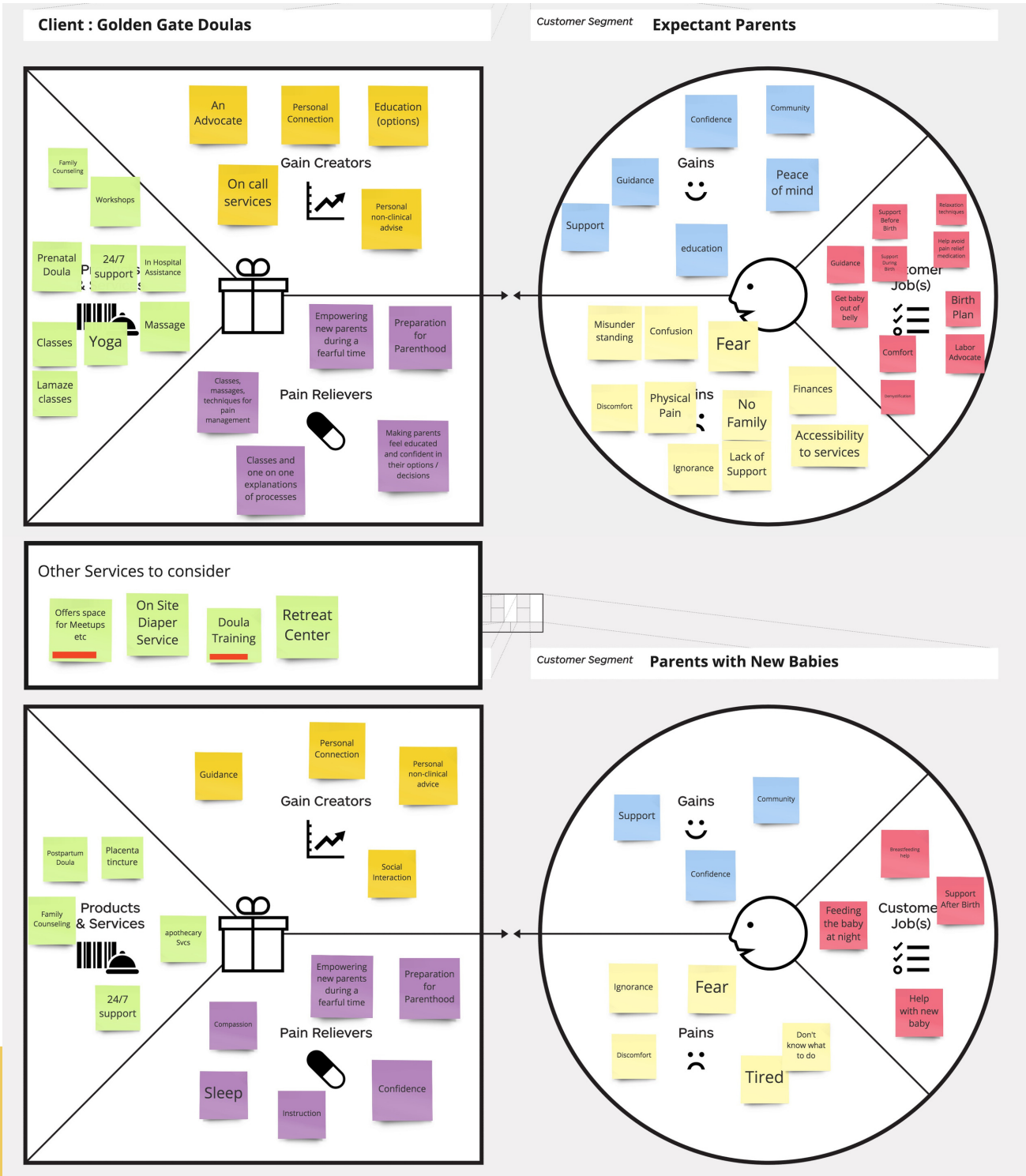
It also includes free workshops at the brick and mortar location. Most of what is involved is education and coaching. During the birth the doulas will help the mother with labor and help the partner provide support to the mother.

They listen to the medical staff and make the mother's options clear.



POSTPARTUM DOULA SERVICES

An hourly service providing care for the mother postpartum, some basic breastfeeding support, baby care and help with the following: errands, routine setting, sleep training, breast pump use and helping the mother prepare to return to work. This is a service that is in high demand and is more profitable than the birth doula service, but she doesn't want to expand it until she has a full birth doula staff (9 doulas)



VALUE PROPOSITION CANVAS

The team identified two customer segments since there are both prenatal and postpartum services that require unique activities.

1. Expectant Parents (prenatal)
2. Parents with new babies (postpartum)



1ST TRIMESTER

During the 'falling in love' phase the team learned Golden Gate Doulas are passionate about their craft and have big goals in building a '**Bed & Breakfast**' for new parents' with in-house postpartum doulas.

After the initial client meeting the team identified that **prior to pursuing** the retreat center goal, there are **business operation challenges to focus** on and tackle immediately. These were the objectives for the 1st Trimester of our business model baby.

1. **Operating as sole proprietor**
(Needs to Incorporate)
2. **Uninsured**
(Needs Liability and General Insurance)
3. **No financial data or proper expense system**



**Big dreams but baby steps first:**

Our team fully supported the idea of the retreat center, but as a long term goal. During the journey the team agreed to set the **project goal** to get Jennifer's doula collective business fully established prior to engaging in a new retreat center project.

Client meeting number two:

The team met with Jennifer in person on **February 7th** at the GGDA location. We spent hours joining her in enjoying her favorite tea and learning more about the business.

"ESTABLISHING A GOOD RELATIONSHIP WITH DOCTORS & NURSES AT THE HOSPITAL IS SO ESSENTIAL TO OUR (DOULA) SUCCESS."

Meeting Objective:

Work through the business model canvas with Jennifer. She hopped up and immediately started posting things with the team.

Through this exercise we **learned the value** of word of mouth and returning clients. Many expectant parents heavily rely on their friends / networks and Yelp reviews when deciding on what doula group to hire.

Jennifer mentioned the **lack of competition** and this raised some concerns from the team. In order to learn more about potential competitors and how to convey the information to our client we conducted an in-depth SWOT analysis.

AS-IS BUSINESS MODEL CANVAS

Here is the business model canvas version the team completed together with the client.



Mission: We help new and expectant parents navigate the journey into parenthood.

Vision: Within the next 3 years, grow Golden Gate Doula Associates from **\$100K in annual revenue to \$200K.**

Segments:

PARENTS: Expectant Parents, Parents with new babies, Future parents
DOULAS: Current Associate Doulas and potential recruits

Value Proposition:

PARENTS: Birth Doulas, Postpartum Doulas, Onsite Resources
DOULAS: Consistent Client Base, Reputation, Training

Channels:

PARENTS: Client's Home, Hospital, Storefront
DOULAS: Phone, App Communication, Storefront, Doula Network

Customer Relationships:

PARENTS: Postpartum checkup, newsletter, swag, personal connection
DOULAS: Continued client referrals

Revenue Streams:

PARENTS: Prenatal Doula Package, Postpartum doula, class fees
DOULAS: Free

Key Partners: **Hospitals, Medical**

Professionals, eDoula Platform, Motherboard Platform
Key Activities: Support in Labor, Planning/consulting/educating, Recruiting

Key Resources: Brand/Reputation, Previous Clients, Medical professionals, Social Media and Website
Cost Structure: Rent/Utilities, Staff, Software

Co-Creation:

Co-creating the business model with Jennifer actively involved, participating and at the center will lead to a high rate of success of the business model. Especially for Jennifer, who is learning so many new basic businesses operational components, we wanted to make sure that the business models felt as if they were being driven by her, not by us. We were guiding her and helping her unlock a deeper understanding of how to accomplish things she had already wanted to tackle.

Keep it Realistic:

Given the number of basic business tasks that needed to be performed, including creating a professional bank account, incorporating, business insurance, hiring help, etc... we needed to **make sure that the outcomes to strive for were realistic**. Jennifer often feels overwhelmed by all the things she doesn't know. It's critical to make sure that the strategy and action plan are within the appropriate scope for her ability.

Mission-Aligned:

Jennifer is very passionate about the future of what GGDA can and should be. However, we found that Jennifer was often not participating in activities that could **help drive her mission and vision forward** and spending time and energy on activities that are holding her back. We are confident that a clear correlation/connection to why the business model supports her vision/mission, will keep her more focused and on track, which ultimately makes the business model more successful.



Strengths (internal)	Client:	Competitor 1 San Francisco Doula Group	Competitor 2 Doulas by the Bay	Competitor 3 Collective Heart Doulas (Previously Empowered Mamas)	Competitor 4 Brilliant Births	Competitor 5 Bay Area Night Doulas	Competitor 6 Harmony Doula Group	Competitor 7 SF Doula Services
Website	www.goldengatedoulas.com	http://sfdoula.org	http://doulasbythebay.com	https://www.collectiveheartbirth.com	https://brilliantbirths.com	http://www.bayareanightdoulas.com	http://harmonydoula.com/index.html	https://www.sfdoulaservices.com
What are your business advantages?	Bridges the gap between medical and mothers, focuses a lot on the Dads, decades of experience	They are a networking group that invites ALL doulas to join and pay an annual membership	They have an established group with a unified front on their online presence	You get 2 of 3 doulas on your team and you get whichever is most rested when you go into labor, that way you know who you're getting and you're not likely to get someone at the end of a long string of births. Mama Circles, meet the other doulas and other mamas every month with a new conversation topic: Pregnancy Loss or Termination Support	Collection of 9 doulas with a wide geographic range throughout the bay area. They do both prenatal and postpartum care and are priced lower than app doulas, last minute bookings available	They have a team of 13 night doulas. They also have many relationships with other local business and resources for newborn and expectant parents.	All doulas have certifications, specialization in VBAC, ed, lactation/breastfeeding, mood disorders, accepts and works with FSA (insurance), services a large area	The ability to customize a package and sleep plan that works for you. They specialize in fussy babies.
What are your core competencies?	Medical experience, trainments for the other doulas, very selective hiring	They have been around for a while and are a location where all Bay area doulas get to find community	Family business, Provides Doula Training	Birth Doula, loss/termination	Birth Doula, Post-partum Doula, natural birth, home birth, hospital birth	Postpartum care Breastfeeding Support Sleep Education Family Adjustment Assistance	40 years of experience with hospitals, birth centers, home births, multiples, genetic, high-risk, fertility challenges, surrogacy, adoption, teens, trauma survivors, LGBTQ	Emotional, social, and physical support for families in the early days of Parenthood: breast-feeding, routine and sleep training, housekeeping, meal prep, grocery shopping, help with other children, mother care, baby carriers, cloth diapers
Where are you making the most money?	Assumption: Post Partum Doulas are the most profitable but most revenue comes from prenatal/birth doulas	Doula membership fees	Not all services have pricing but here are as follows: Postpartum Support, Birthing Support, Breastfeeding Support, Sleep Support, Placenta Encapsulation, Nannies, Hire a doula student	Birth Doula - 1600-2500 depending on your income "sliding scale, a tool for economic justice", but it is more expensive than other doula services	Postpartum doula \$360/night, \$85/hour for daytime 1500 for the birth doula package	Packages are tailored to the family but night doula services is their main focus	Most expensive package is \$6000 which includes prenatal and postpartum services. Otherwise it's \$400/hr single \$60/hr twins Base doula package is \$1500	Overnight sleep packages
What are you doing well?	Variety of offerings, touchpoints, relationships with hospitals and doctors, provides dad support groups and focus for dads, retaining customers and referrals through customers, using online tools to scout for doulas that would benefit from her cost model	They seem to have a big influence in the Doula community.	They have very high number of 5 star reviews. They have an easy to use website and straightforward contact services form. They also have an easy to follow and educational navigation about Doulas and parenting education. They also cater to families who may have lower budgets by giving the opportunity to hire a student doula *We are dedicated to offer the emotional support for families after the 4th trimester*	16 yelp reviews, all 5 star and so glowing they wish they could be 6, but they're almost exclusively for one doula, the third is never mentioned, I would be disappointed if I didn't get Allie! - the third has a bunch of glowing reviews under her own name through 2017	6 yelp reviews, all positive, but nothing that sets them apart except for the possibility of last-minute booking	Based on yelp reviews, new parent education/training	Offering varying as well as combo packages of prenatal and postpartum. Offering Childbirth + Newborn Education classes as additional offerings. Focusing on East Bay cities. Hospitals and doctors love working with them.	Being flexible to the unique client needs. Providing emotional support and education.

SWOT ANALYSIS

HIGHLIGHT FINDINGS

Competition:

This analysis was incredibly insightful for the team to understand blind spots (the competition). Goal was to get ideas for expanding Golden Gate Doula offerings by understanding the competitors and what they are doing well or unique.

Business Operations:

No financial awareness (struggles to keep books at all), paying unknown/managed subscriptions. Goal is to consolidate what financials Jennifer may need and to get a bookkeeper + quickbooks

Branding:

How might we clarify and expand business notoriety and awareness
 Doula audit: The team found that all Golden Gate Doulas had their own Yelps, social sites, and were not following protocol. This causes confusion amongst future clients. Their as a unique opportunity to highlight that Jennifer is a licensed nurse! It's not common in the doula industry.



2ND TRIMESTER

Through the As-is Business Model Canvas and SWOT analysis, the team gained a better understanding of a multitude of areas of opportunity. We wanted to dig even deeper therefore met twice with Jennifer during this phase.

Outstanding topics to clarify during this phase:

1. The status of LLC and Tax ID / EIN
2. Doula Insurance and commercial space liability insurance.
3. Brand Identity: Advertising & Marketing
4. Employee / Office Handbook
5. Doula contracts
6. Business Goals for the next 1,3,5 years
7. Understanding current expenses and GGDA finance process.



FIRST ONE PAGE BUSINESS PLAN

<p>Vision What are you building?</p>	<p>Within the next 3 years, grow Golden Gate Doula Associates, a San Francisco doula company providing Birth and Postpartum Doula services to new and expectant parents to from \$100K in annual revenue to \$200K¹</p>
<p>Mission Why does this business exist?</p>	<p>We empower new and expectant mothers and partners in the months prior to the birth and the first few weeks following the birth of their child.</p> <p>We support and educate both parents through birth doula and postpartum services, as well as a variety of classes, training, birth plan support, and counseling.</p>
<p>Objectives What will you measure?</p>	<p>Objective #1: Increase # of birth doulas from 6 to 9 by August 2019.</p> <p>Objective #2: Increase # of clients from 230 to 320 by January 2020</p> <p>Objective #3: Increase Gross Sales/Revenues from \$100K in year 1 to \$135K in year 2</p>
<p>Strategies How will you build this business?</p>	<p>Strategy #1a: Grow the business by adding quality doulas to the association</p> <p>Strategy #1b: Attract & retain best doulas by absorbing one of the competing doula associations</p> <p>Strategy #2a: Increase visibility on Yelp and other social presence platforms by purchasing ads</p> <p>Strategy #2b: Increase clients by directing new clients to the new doulas to better establish them</p> <p>Strategy #2c: Promote prenatal yoga classes and offer other educational classes to non-doula clients</p> <p>Strategy #3a: Use technology to streamline business operations by creating a bookkeeping</p> <p>Strategy #3b: Perform a content audit to ensure brand cohesion on website and social platforms</p> <p>Strategy #3c: Assure sustainability by analyzing the 2018 finances and identifying the most expensive and the most profitable aspects of the business</p>
<p>Action Plans What is the work to be done? <i>[verb + business building project/ program + start or completion date]</i></p>	<p>Plan #1a: Complete Employee Handbook by April 1, 2019</p> <p>Plan #1b: Hire 3 Birth Doulas by August 1, 2019</p> <p>Plan #1c: Hire an office assistant by April 1, 2019</p> <p>Plan #2a: Launch online ad campaign by September 1, 2019</p> <p>Plan #3a: File as an LLC by March 10, 2019</p> <p>Plan #3b: Install Quickbooks by March 10, 2019</p> <p>Plan #3c: Perform Software and Application Audit by August 1, 2019</p> <p>Plan #3d: Organize Finances by April 15, 2019</p>

The original OPBP highlights:

As seen in the page above. We developed our initial **One Page Business Plan (OPBP)** with some short term goals in mind, such as finalizing the LLC and her insurance. We put in place some modest goals based on Jennifer's desire to get up to a full docket of prenatal doulas (which to her is 9) and how many clients they can each take on in a year.

The Advocate:

During this phase in the project both Liberty and Nelly joined Jennifer in meeting with the Bank of America to learn more about GGDA finances and account statuses. The goal was to be Jennifer's advocate to make sure she was not being taken advantage of as a small business owner. The team wanted to minimize the loss of accurate communication concerning gaining access to financial information.





3RD TRIMESTER

The team's goal during this phase was to establish concrete strategies and make sure they aligned with Jennifer's future goals by revisiting her vision. Here are her answers from our latest meeting.

What do you want your role to be in the future?

- Managerial position.
- Would like to be able to take time off and not worry.
- Set up doulas, cut down on her own births/month.

What's motivating you to grow the business?

- Prenatal services and the gratification from that.
- The community bond that is created, the yelp reviews, the credibility with the medical providers, the brand association of professionalism

What are your goals in the next 3-5 years?

- Doulas up and running - enough to pay rent
- 5-6 years be profitable enough to open the retreat center
- Become more business savvy, ie: partner with businesses



TO-BE BUSINESS MODELS

THREE NEW BUSINESS MODEL OPTIONS & STRATEGIES FOR GGDA'S FUTURE CONSIDERATIONS

01 SIMPLICITY

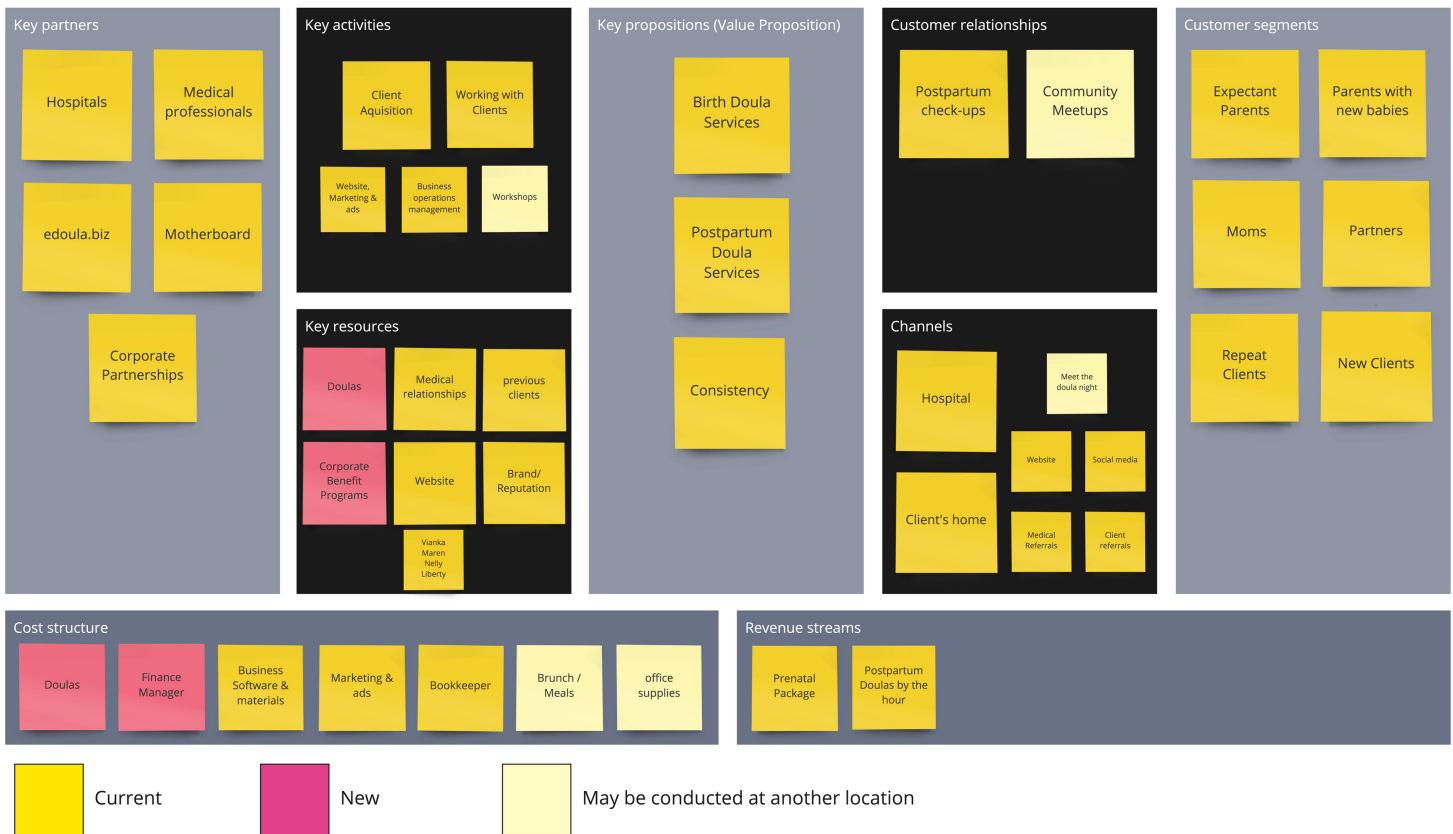
This business model is the simplest version of what Jennifer is doing now. We don't think that she is likely to embrace it because of how ambitious and creative she is, but we feel that it is important to present this option to her because it is the essence of her company. This is homebase. If she does this well, she can invest in more creative endeavors and if she starts to struggle financially, she can lean back on this simpler plan to gain traction.

02 MATCHMAKER

GGDA current business model is really a doula-client matching service. That's not how Jennifer thinks about it, but because she does not pay the doulas but rather collects a 20% signing fee from them upon signing the client, that is what she does. This is why she is struggling to keep them consistently on brand. However, if she is more comfortable with this relationship, it can be expanded on to her benefit.

03 EMBRACE THE SPACE

Jennifer loves the GGDA space and she especially loves that she has been able to create a community of parents that come together after their babies are born to socialize and have fun. We believe that she can expand on this in a way that is fulfilling for her and profitable for her business, but it will require some changes.



OPTION 1 - SIMPLICITY

EXPIRATION DATE: MAY 2022

Features:

- Hire the doulas
- Hire a General Manager
- Lose the brick and mortar
- Strengthen relationship with medical community
- Focus on supporting doulas in the association and expanding her client base.

Benefits:

- Cuts down on costs
- Strengthens brand and reputation
- Expands client base

Potential Drawbacks:

- Loses competitive differentiation
- Loses added benefits for clients
- Is contrary to Jennifer’s ambitions

SIMPLICITY

OPTION 1 ONE PAGE BUSINESS PLAN

<p>Vision What are you building?</p>	<p>Within the next 3 years, grow Golden Gate Doula Associates, a San Francisco doula company providing Birth and Postpartum Doula services to new and expectant parents to from \$100K in annual revenue to \$200K²</p>
<p>Mission Why does this business exist?</p>	<p>We empower new and expectant mothers and partners in the months prior to the birth and the first few weeks following the birth of their child.</p> <p>We support and educate both parents through birth doula and postpartum services.</p>
<p>Objectives What will you measure?</p>	<p>Objective #1: Increase # of birth doulas from <u>6</u> to <u>9</u> by <u>August 2019</u>.</p> <p>Objective #2: Increase # of clients from 230 to 320 by January 2020</p> <p>Objective #3: Decrease costs by 30% in year 2</p>
<p>Strategies How will you build this business?</p>	<p>Strategy #1: Grow the business by adding quality doulas to the association</p> <p>Strategy #2a: Increase visibility on Yelp and other social presence platforms by purchasing ads</p> <p>Strategy #2b: Increase clients by directing new clients to the new doulas to better establish them</p> <p>Strategy #2c: Increase recommendations from the medical community by forming relationships with OBGYN offices around the city</p> <p>Strategy #2d: Form partnerships with local businesses to offer doula services to corporate benefits package</p> <p>Strategy #3: Reduce costs associated with a brick and mortar location by working remotely/from home</p>
<p>Action Plans What is the work to be done? <i>[verb + business building project/ program + start or completion date]</i></p>	<p>Plan #1a: Hire the contracted doulas as employees by August 2019</p> <p>Plan #1b: Hire a General Manager by August 2019</p> <p>Plan #1c: Hire 3 Birth Doulas by December 2019</p> <p>Plan #2a: Launch online ad campaign by September 1, 2019</p> <p>Plan #2b: Remove Jennifer’s name from Yelp directory to limit the number of clients that ask or her specifically</p> <p>Plan #2c: Target specific OB offices that deliver at hospitals where Jennifer is already known and become the preferred doula association of 3 offices by April 2020</p> <p>Plan #2d: Meet with Salesforce representatives in May 2019</p> <p>Plan #3: Vacate the brick and mortar location at the end of the first year’s lease, August 2019</p>

Lose the Brick and Mortar

The storefront is a beautiful space and provides a lot of value to Golden Gate Doula Association. It is, however, also one of the biggest expenses (the biggest right now because she doesn't pay her doulas). **It is one of the key differentiators for her over her competitors, but it is not essential to her business.** If Jennifer finds that she is struggling financially, she can ditch the storefront and still have a solid business. This means no more community Meetups, no more classes, no more workshops and no more meet the doula nights. The workshops and meet the doula nights are still important to growing and maintaining her client base, so we recommend renting a space somewhere for these events.

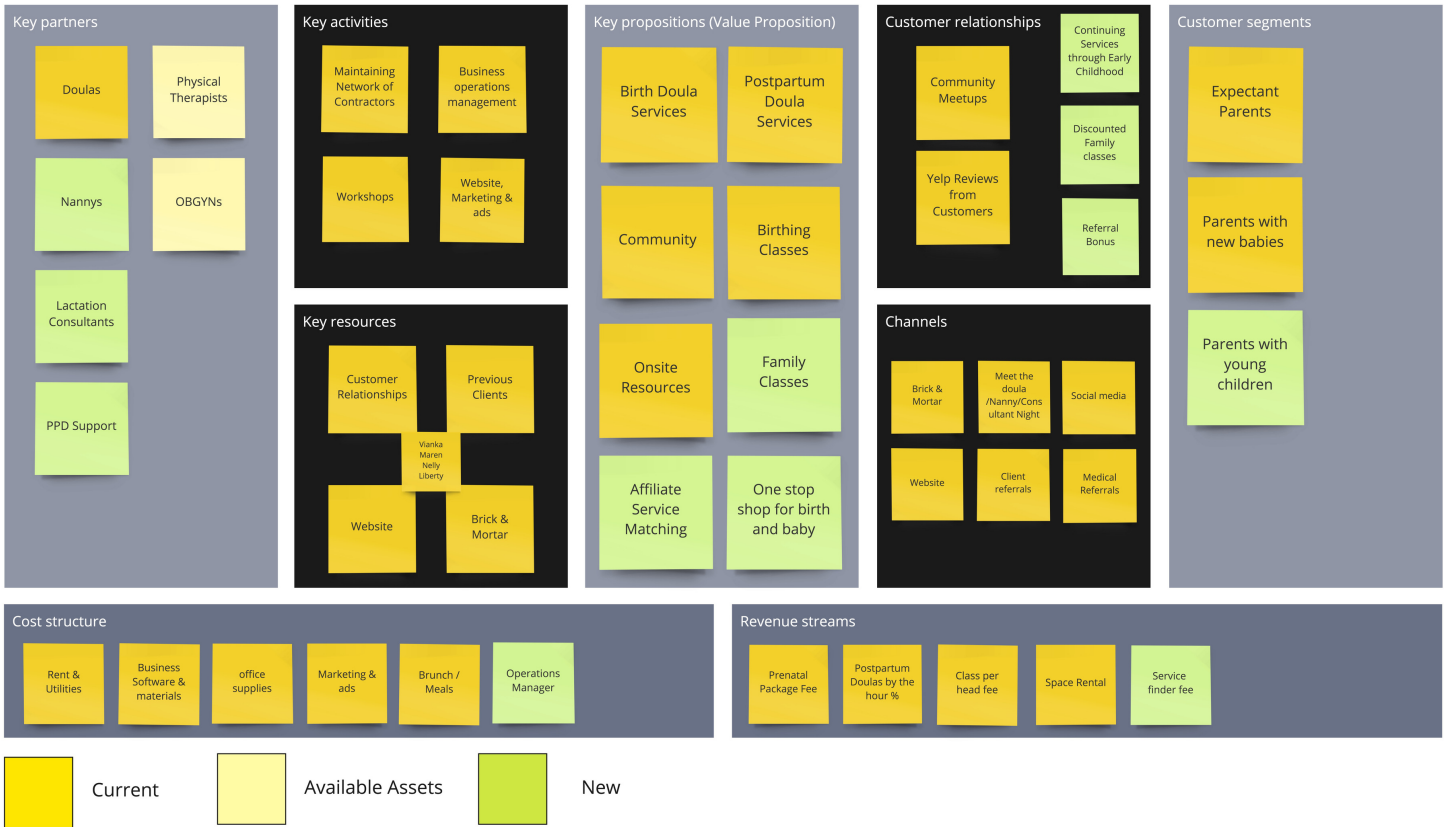
Build up relationship with the medical community

Because we've gotten rid of the brick and mortar location, Jennifer should double down on one of her other key differentiators: **her relationship with the medical community.** She is already actively promoting her brand in the local hospitals, she should extend that to OBGYN clinics. One of our customer intercepts is a nurse practitioner who works at an OBGYN clinic and when she heard about Jennifer, she said that her clinic would love to have a trusted doula group to refer clients to. Clients are interested in doulas, and working with a doula is known to reduce the risk of a number of complications during childbirth. Some doulas, however, have what this intercept referred to as a "crunchy granola" vibe that makes the medical community uncomfortable. The Golden Gate Doula Associates would be appealing to these clinics.

Focus on supporting and educating the doulas in the association

With a simpler business model, **Jennifer can focus on growing and establishing her doula group.** She can hire more doulas that are aligned with her vision and potentially train doulas as well. They can expand their client base more quickly with a clearer focus and gain the reputation that Jennifer herself has for the whole of the doula group. From there she can look to corporate relationships like the one she is looking into with Salesforce.





OPTION 2 - MATCHMAKER

EXPIRATION DATE: MAY 2021

Features:

- Keep doulas as contractors
- Add affiliate contractors
- Nannies
- Lactation consultants
- Physical therapists
- Expand classes and social events to reflect broader offerings

Benefits:

- Takes advantage of the current structure to lengthen the customer relationship
- Has the potential to expand the client base because it makes it easy to add additional doulas and affiliate contractors
- Leverages her current connections
- No known competitors in this space

Potential Drawbacks:

- Much of Jennifer’s time will be spent interviewing consultants to make sure that they meet her criteria as well as
- Further dilutes the Golden Gate Doula Associates brand

MATCHMAKER

OPTION 2 ONE PAGE BUSINESS PLAN

<p>Vision What are you building?</p>	<p>Within the next 3 years, grow Golden Gate Doula Associates, a San Francisco birth and baby client matching company providing client matching services to parents and service providers from \$100K in annual revenue to \$200K³</p>
<p>Mission Why does this business exist?</p>	<p>We empower parents throughout pregnancy and in the early years after the birth by finding trusted service providers to meet their needs</p> <p>We support and educate parents by matching them with quality, pre-screened birth and postpartum doulas, lactation consultants, therapists, and nannies and providing a variety of classes, workshops and community events</p>
<p>Objectives What will you measure?</p>	<p>Objective #1: Increase # of contractors from 9 to 15 by April 2020.</p> <p>Objective #2: Increase # of clients from 230 to 320 by January 2020</p> <p>Objective #3: Increase Gross Sales/Revenues from \$100K in year 1 to \$135K in year 2</p>
<p>Strategies How will you build this business?</p>	<p>Strategy #1a: Grow the business by adding quality doulas to the association</p> <p>Strategy #1b: Retain additional contractors from within Jennifer's contacts</p> <p>Strategy #2a: Increase visibility on Yelp and other social presence platforms by purchasing ads</p> <p>Strategy #2b: Increase clients by directing new clients to the new doulas to better establish them</p> <p>Strategy #2c: Retain clients for longer by continuing to match them with services as their children grow</p> <p>Strategy #3a: Build on business partnerships for product sponsorship and sales</p> <p>Strategy #3b: Build on business partnerships service matching</p>
<p>Action Plans What is the work to be done? <i>[verb + business building project/ program + start or completion date]</i></p>	<p>Plan #1a: Hire 3 Birth Doulas by December 2019</p> <p>Plan #1b: Create a refined brand handbook and contract by December 2019</p> <p>Plan #1c: Hire 3 Additional contractors from within network by April 2020</p> <p>Plan #1d: Hire a General Manager by August 2019</p> <p>Plan #2a: Launch online ad campaign by September 2019</p> <p>Plan #2b: Remove Jennifer's name from Yelp directory by August 2019</p> <p>Plan #2c: Launch a new website that allows clients to find contractors through GGDA by August 2020</p> <p>Plan #3a: Add 3 additional sponsored products by October 2019</p> <p>Plan #3b: Find a service matching partners for each category by April 2020</p>

Keep doulas as contractors

This reduces any friction involved in signing new doulas, she can in fact simplify her contract and individual doulas can keep their individual brands.

Add affiliate contractors*Nannies*

There is a competing doula group that does have nannies in their group, this way they can extend the client relationship from pregnancy to newborn through early childhood.

Lactation consultants

Breastfeeding is a key struggle among new moms. One of Jennifer's doulas is a lactation consultant, but if she could add more to her team, they would be in demand.

Physical therapists

She has the space for physical therapists to use, and she has a pelvic floor specialist that comes in to work with clients. There are other postpartum physical therapy specialists that she could add to make her a one-stop shop for birth and baby services.

Other:

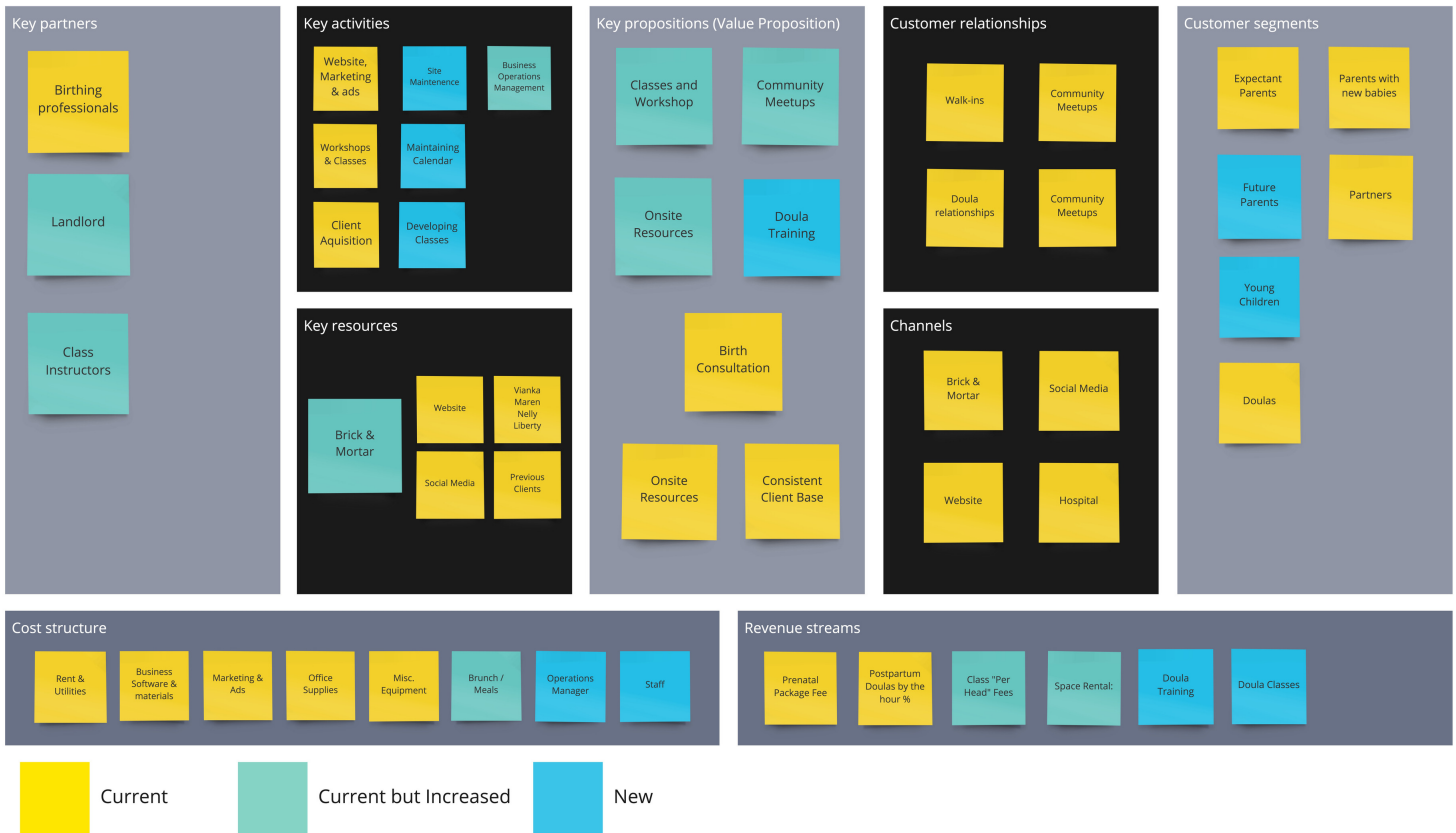
Postpartum Depression Specialists

Masseuses : again, she has the space for masseuses to work with their clients and at least one of her doulas does prenatal massage

Expand classes and social events to reflect broader offerings

In addition to a meet the doula night, she could offer a meet the specialist night (or something with a catchier name). Additional classes should be offered by the people in her network. Lactation classes and support groups would, again, be huge draw for many new moms and playgroups for former doula clients could be an easy addition (assuming her liability insurance is in place)





OPTION 3 - EMBRACE SPACE

EXPIRATION DATE: MAY 2021

Features:

- Focus on Brick and Mortar Potential
- Open workshops to the public
- Build out class portfolio
- Offer doula training for outside doulas
- Offer more community Meetups
- Minimize doula activity and focus on community building

Benefits:

- Strengthens Customer Relationships
- Continues Customer Relationships further beyond birth
- Differentiates Golden Gate Doula Associates even more from their competitors
- Leverage the space for additional income
- Play to Jennifer's passions

Potential Drawbacks:

- Pulls attention away from the Doula business
- May not bring in enough additional income to cover the costs
- Puts them in competition with Blossom Birth, an established bay area chain, which doesn't have its own doulas, but can refer clients to doulas and offers birthing classes, yoga and massage

EMBRACE SPACE

OPTION 3 ONE PAGE BUSINESS PLAN

<p>Vision What are you building?</p>	<p>Within the next 3 years, grow Golden Gate Doula Associates, a San Francisco doula company providing Doula services and continued support and community to parents to from \$100K in annual revenue to \$200K⁴</p>
<p>Mission Why does this business exist?</p>	<p>We empower and support parents throughout pregnancy and for the first few years of childhood. We educate both parents through birth doula and postpartum services, as well as a variety of classes, training, birth plan support, and counseling and provide a place to come together as a community and learn from experts.</p>
<p>Objectives What will you measure?</p>	<p>Objective #1: Increase # of birth doulas from 6 to 9 by August 2019. Objective #2: Increase # of clients from 230 to 320 by January 2020 Objective #3: Increase Gross Sales/Revenues from \$100K in year 1 to \$135K in year 2</p>
<p>Strategies How will you build this business?</p>	<p>Strategy #1a: Grow the business by adding quality doulas to the association Strategy #1b: Attract & retain best doulas by absorbing one of the competing doula associations Strategy #2a: Open workshops up to the public Strategy #2b: Build out class portfolio Strategy #2c: Offer additional community meetups Strategy #3: Offer training for outside doulas</p>
<p>Action Plans What is the work to be done? <i>[verb + business building project/ program + start or completion date]</i></p>	<p>Plan #1a: Hire the contracted doulas as employees by August 2019 Plan #1b: Hire a General Manager by August 2019 Plan #1c: Hire 3 Birth Doulas by December 2019 Plan #2a: Announce workshops available to public by August 2019 Plan #2a: Add 3 additional monthly workshops by December 2019 Plan #2b: Add additional 4 classes from within network resources by December 2019 Plan #2c: Add playgroups by October 2019 Plan #3a: Leverage doula network to advertise upcoming doula training by March 2020 Plan #3b: Offer first doula training class by April 2020</p>

Open workshops to the public

Right now the childbirth and baby workshops are only available to doula clients. However, many **expecting parents, especially second, third, (etc.) time parents, are not interested in a full doula package**, but would be interested in attending a class or two as a refresher. This would allow them to bring in additional income from something that they are already doing, with minimal effort. If they expand to meet the needs of the larger community, they will also be able to offer more workshops on a larger range of subjects that will enrich the value for doula clients. Currently, there is only one a month and the topics vary. If you're only a client for a couple of months you don't have access to all of the options before you have your baby. Growing the workshop schedule will require having a full docket of prenatal and postpartum doulas to run them.

Build out class portfolio

Right now there are classes available to the public but they are minimal. There is a prenatal yoga class taught by one of the doulas, and an infant CPR class. There are also occasional one-time classes in things like "baby wearing" (footnote: How to use baby wraps and carriers to safely "wear" your baby). In order to **expand the class portfolio**, Jennifer will have to either dig into the expertise available within her doula group or use her network to bring in more outside teachers for regular classes.

Offer doula training for outside doulas

Jennifer has a great deal of expertise in this area. She can use her knowledge to train new doulas.

Offer More Community Meetups

The space could also be rented for additional community Meetups such as playgroups that would appeal to former doula clients. They could continue to use the space to enhance the social bond that Jennifer helped form with her new parent brunches and dad tribe Meetups.

Minimize doula activity and focus on community building

In order to develop this new area of her business, Jennifer will have to **minimize or stop taking on doula clients**. It is, however one of the things that we clarified with her: Do you want to be a doula or do you want to manage a business. She wants to manage a business and in order to do that, she needs to take things off her plate.





POSTPARTUM

We don't have a specific business model to **recommend** to Golden Gate Doula Associates. Their house is still not in order and both the second and third business models aren't viable for at least a year from now. Instead we have simple steps that we suggest she take in order to have a solid foundation from which to grow. What we crave most for her is order in the chaos.

- Hire the Doulas
- Hire a General Manager
- Continue to sort out the finances

Some of this is present in the first business model, **Simplify**, which we created for Golden Gate Doula Associates so that Jennifer could see what the simplest, strongest version of her business would look like. We recommend that she put these things in place to strengthen her business even if she is not interested in paring down to the bare minimum.



RECOMMENDATIONS

TEAM SUGGESTIONS AND FINAL BUSINESS MODEL BABY COACHING TIPS

Hire the Doulas

Jennifer originally began her business by hiring in the doulas, collecting all fees from clients and distributing it. She quickly became overwhelmed with all of the paperwork and organizational stresses that piled on top of her already full doula docket and looked for a creative way out. What she believes is a simplification, however, actually complicates her relationship with her doulas, loosens their ties with the GGDA, and dilutes her brand. She may feel that they are a tight group, and they may all like each other, but her relationship with them is tenuous. She will never have the cohesive doula group that she dreamed of without a more formal business relationship.

Hire a General Manager

Because we know that a successful business for Jennifer means doing what she loves (and what she loves is not financial or organizational), we suggest that she solve these problems by hiring an Operations Manager or General Manager. Jennifer already has an assistant who helps go through emails and referrals, but this is the third assistant that she's had since we started working with her. She also needs more help than just an assistant. She needs someone who can manage payroll, taxes, and bills as well as the community calendar and the client distribution. This person will give her business the solid foundation it needs so that she can grow into her dreams. She or he will also make it more palatable to hire the doulas so that Jennifer does not have to worry about collecting money from clients and payroll.

Continue to sort out the finances

To her credit, right after our first meeting with her, Jennifer went to the bank and started to disentangle her personal finances from Golden Gate Doula Associates. This has not been an easy process. Though we did eventually get an Income Statement from a bookkeeper that she hired, much of the income and expenses are uncategorized, and apparently, according to both Jennifer and Nelly (who went in person several times to help out) just totally wrong.

Jennifer will want (with the help of her General Manager) to take a close look at where her expenses are going and where the money is coming in. We believe that the postpartum doulas are very profitable, and according to Jennifer, they are in high demand. She may change her mind about not needing more than three. She also needs some clarity on the expense of the brick and mortar and how much additional revenue she brings in because of it (in class fees and rent from the therapist).



CONCLUSION

PRIORITIZE | HIRE | DIFFERENTIATION

We want to empower Jennifer to see clearly the things that need prioritizing as well as give her the tools to be able to organize the priorities and tackle them. We want her to see the value of hiring someone to be a business operations manager vs. an office assistant (and how that will improve her current frustrations). We also want her to feel she has a choice on services to offer that could improve the customer experience. We want her to understand her competition better so she can clearly differentiate.



NEXT STEPS

DELEGATE | CONTROL | CLARITY

In the coming weeks, we will present Jennifer with a version of this report that is more tailored to her and go to speak with her in person (for as much of the group as possible). We will go over our deliverables with her and answer any questions that she might have. We also have other things that we've been working on to help her, including a more polished website option.

THANK YOU

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