



BUSINESS MODEL CANVAS **FOR SARAH ALMENDARIZ COUNSELING**

2018

Approach for small business development

Don't be another "me too" model.

Nine building blocks for business model canvas (BMC):

1. The customer segments, who is the target audience?

-The target audience are people 4 years old and up going through tough life experiences and need some extra help. Parents who aren't sure what's going on with their kids, adults who feel overwhelmed with what's going on in their life, kids who are misunderstood.

2. The value proposition, what is it that I have to offer? what will I present to people that they will find value in? And be willing to buy the service?

- One on one attention to their specific needs.

-We create an individualized and tailored treatment plan just for them, no cookie cutter molds or approaches.

-I can set up an appointment within 7 days.

-Guaranteed response within 12 hours.

3. The channel, communication and out reach. What type of promotion and advertisement. He used to get the message out? Second part, how will I deliver? How will I get my product/service to them?

-Psychologytoday.com

-Website blog writing

-Social media outlets- FB and linkedin

-Word of mouth

-An email list?

-Alamo city mom list of resources

-Offer free one hour training to the community in an effort to acquire at least one client

4. The customer relationship, how will I intend to build my relationship with my customers? Warm and friendly? Transactional in nature?



-Very friendly and calm. Minimize overly professional and/or academic banter unless it would benefit the client. I encourage family's to be present on the first session (for minors) and am willing to provide services to anyone in the family system depending on client request.

5. *The revenue streams*, how will I make money? How will I get paid?

-All transactions will be check or card based. Paypal system is implemented via the use of iphone. All receipts are sent to the clients in the manner they choose. Revenue is tracked manually on an excel spreadsheet.

BACKSTAGE INFRASTRUCTURE

6. *The key resources*, what assets, tools, resources, equipment well I need to actually be able to deliver my service.

7. *Key activities*, core competency. What is it that I need to do better than anybody?

8. *Key partnerships*, I can't do everything by myself.

9. *Cost structure*, what will I do to ensure a revenue stream is more than outgoing cost?

-review every 6 months.

Do I have a new aggressive competitor? Do I have a better idea now?

-don't do this alone. Don't get caught in a silo.

-sketch out and polish out this idea. Finalization isn't necessary. This is the draft-step one.

ANNUAL FOLLOW UP

BUSINESS MANAGEMENT STRATEGIES

November 11, 2019

Important to track how many potential client inquiries I'm receiving each week/month

What is my companies mission statement?

How can I develop a market analysis? What information do I need?

Good business plans should include an executive summary, products and services, financial planning, marketing strategy and analysis, financial planning, and a budget

Dialogue is key to maintaining an active client accrual. Let them keep hearing my voice.



What sets your business apart from competitors? How do you conduct business in a way that is totally unique? What are your competitors doing better than you are?

You must know, down to the last dime, where the money in your business is coming from and where it's going in order for your business to succeed.

Consider hiring a tax advisor and professional bookkeeper or certified public account to help manage your financial affairs.

Revenues. Know your sales on a monthly, quarterly and year-to-date basis. Compare these to your plan to see if you are behind or ahead.

There are five types of receipts that you should pay extra attention to:

- Meals and entertainment
- Out of town business travel
- Vehicle related expenses
- Receipts for gifts
- Home office receipts

Monitor number of clients served per month.

Ensure client customer service is key

Make sure that your insurance policies are on track and not set to lapse, to avoid unpleasant surprises.

A mission statement

Conquer a niche market- focus on meeting unmet client needs and concentrate on meeting those unmet needs. idea: how to accrue data or info from clients who are waiting? What should counselors get better at? What has been the most helpful piece of what sarah does outside of the office? What should all counselors get better at? In a perfect world how should your counselor be outside of the office.

-sketch out and polish out this idea. Finalization isn't necessary. This is the draft-step one.

SEMI-ANNUAL FOLLOW UP

BUSINESS MANAGEMENT STRATEGIES

April 27, 2020

Track client potentials- track means they contacted me(email phone), age of client, pp or ins (what type of insurance), who referred to

Find out average percentage outflow of cash flow versus income- CHECK

What is percentage of contractor earnings on income- CHECK



Create projection of cash flow for at least 6 months- CHECK

Track client contacts per month (mirror square and excel)- CHECK

Track meeting minutes- CHECK

Maintain email contact

-Somewhat of a struggle due to transition from gmail to gsuite. Additionally, I have not created a subscriber list and impact of maintaining email contact based on what's going on in the business.

Consult with employment lawyer to ensure I'm running things as a group private practice appropriately.

-Not yet completed.

Is my company name disallowing growth to naturally form? Will my contractors benefit with my name?

-**Yes, my company name is limiting.** After speaking with John Clarke, suggestion was to parallel with a different company name for the counseling process but keeping my personal name on training or workshop development.

What is my exit strategy to scale back once I'm ready?

Compile email list and break up into categories

-this has been a challenge because I have to create a way to begin a subscriber list where the audience volunteers to be part of the

Complete schedule C 1040

What is my financial plan? How many hours do I want to work? Need to work? How many weeks off per year do I want? How much do I need? How much do I want to bring home?

-Craft my ideal schedule- daily, weekly, monthly and yearly. Days off? Hours? 48
- Set my ideal income- \$130k [plus 30% 169k??]

Who are my competitors?

A tag line is the thesis of my website. It should captivate attention within 8 seconds and offer some form of hope or inspiration. Fun. Short. Easy to understand. Easy to remember.

-“We help you get through the tough stuff so you can get back to the good stuff.”

Become a CEU provider- will this be helpful in the long run?

Why am I doing this work in the first place?

What is my mission? What is my end point? If I accomplished what I set out to do what would it be?

How will I get there? What is my vision? How will I work towards my mission? The exact steps I will take to deliver on my mission. How will I deliver my services and my products? How will the business operate? How will I regard my clients?

How will I build my brand and what will it say?

Identify my values- quality, efficiency, competency



WERE GROWING!!!! GROUP PRACTICE LAUNCH JUNE 2021

BUSINESS MODEL CANVAS **FOR LA LUZ COUNSELING**

Approach for medium business development

Don't be another "me too" model.

Review 2021

Review August 2022

Review December 2022

Nine building blocks for business model canvas (BMC):

1. *The customer segments*, who is the target audience?

-The target audience are people struggling with anxiety and trauma. Adults who aren't sure what's their purpose is, adults who feel overwhelmed with what's going on in their life, kids who are misunderstood and act out behaviorally, etc

-teens with anxiety problems. Feeling overwhelmed, shut down easily, try to tackle things on their own, overachievers, self-inflicted pressure to perform well. Positive family support system

-AND high exec females. Those who are well off, but struggling emotionally. They feel stuck but have a desire to be unstuck



-With two new clinicians we are focusing more on children's work. RPT. Continuation of high executive females, struggling with women's issues, trauma, and counseling.

2. *The value proposition*, what is it that I have to offer? what will I present to people that they will find value in? And be willing to buy the service?

- 5 star rating to date

- Set up an appointment within 7 days.

- Guaranteed response within 12 hours.

3. *The channel*, communication and outreach. What type of promotion and advertisement. He used to get the message out? Second part, how will I deliver? How will I get my product/service to them?

- Psychologytoday.com

- Website blog writing- i'm the only one doing blog writing and I've been slacking. I need to minimally do two per month. At present we're averaging one every 4 to 6 weeks.

- Social media outlets-IG and linkedin

Products are not delivered in this manner. Just visibility

- Word of mouth-initial survey satisfaction our building positive results this far. We appear to have loyal followers, and the word of mouth referrals, CBC, Prayer, clients, one lawyer, and potentially one judge.

- An email list?

bleh. Too much work

- Offer community presentations in an effort to acquire at least one client- probono? for pay?

try having the clinical team show face more in the community. Quia to do upcoming podcast and mindfulness moment at CIS

I am doing more work in the community, and recently became a member with national Association of women, business owners to be more forward facing in the community.

Become more visible to the community and potentially showcase at vendor opportunity, such as 5K's, community, fairs, weekend, resource, fairs, and market days, etc.

4. *The customer relationship*, how will I intend to build my relationship with my customers? Warm and friendly? Transactional in nature?

- Make verbal contact with all potential clients.

- Counselors to make contact with each potential client to ensure proper fit



All potential clients have a quick consultation with the prospective counselor to ensure the right fit and what to expect.

Initial contact begins with front office answering the phone. I'm realizing more of these are front line with regard to conversion. Continue offering additional support call. My monthly staff meetings have been helpful for all to be on the same page, both admin and clinicians.

5. *The revenue streams*, how will I make money? How will I get paid?

- All transactions will be check or card based. Use of stripe through EHR
- Create LLC dinner
- hire accountant **DONE**
- Sarah get onto salary **DONE**

S Corp. has been helpful, use of professional accounting/bookkeeping system through join heard is critical. Between 2021 and 2022. I increase my salary by about 10 K. At the end of 2022 I am at a 50 K salary with owners RAW every other week for about 1K.

All team members are eligible for increased, hourly reimbursement to recent decision to increase 2023 client services by five dollars. I presently have two administrators, one associate level, and a three fully license clinicians all are on hourly as all are part time. Present, I have one admin and one clinician who are willing to pursue full-time employment however, not enough work available.

BACKSTAGE INFRASTRUCTURE

6. *The key resources*, what assets, tools, resources, equipment well I need to actually be able to deliver my service.

- EHR system
- Phone system
- online scheduling option?
- instant messaging system on website?

We are all clear in this area, internal systems have been streamlined, and all are participating appropriately. Recent implementation of the standard operations procedures has been helpful in continuing to grow and "woke up" each month. Jennifer, administrative assistant, has been exceptionally helpful to continue, adding on additional information into the operations manual.

At present, we are using SimplePractice, stripe, phone.com, gusto recently converting into join, heard, join, heard, in psychology today profiles as key resources.

7. *Key activities*, core competency. What is it that I need to do better than anybody?



- set up an appointment efficiently and immediately.
- scheduling asap for the client
- get a unique referral to the caller if we can't help; admin to have list of vetted referral sources

Due to demand, we must continue with offering an initial appointment within seven days. Ideally a first appointment should be booked within four days. I want 100% of callers to either be referred to a unique person who fits their needs or be scheduled within 4 days with one of our clients.

Initial call to initial appointment must be within four days. This is my goal..

8. *Key partnerships*, I can't do everything by myself.

- hire admin assistant **DONE** this is going amazing!
- get part time contractors- **NOPE. HIRE ALL AS W2** so I can maintain executive control and decision making to sculpt expectations of business this was one of the best decisions I could've made to switch from contractors to employees.
- hire accountant? **DONE** currently join heard counting has sufficiently addressed all of my needs.

9. *Cost structure*, what will I do to ensure a revenue stream is more than outgoing cost?

- keep private pay as forefront; no more insurance **DONE** as of May 2022- all cash pay
- Review all timesheets to confirm client paid through system **DONE** Exec admin now doing this. Cutting my time for review substantially
- review with accountant

Going into 2023 we are increasing all client services by five dollars. Me and administrative assistance have worked effectively and efficiently to ensure proper notification of the rate increase to both team and clients. As a result, I am considering unlikely to decide to give all team members an increase in hourly rates- a 5 to 8% increase. Although this may have to be reconsidered as five dollar increase was 3.45%.

What am I doing well?

I feel I'm doing a better job at balancing my time between provider and owner. I continue to see about 8 to 13 clients per week. The goal for 2023 is to remain closer to eight clients per week on average for clinical work. We have also implemented quarterly, teambuilding events, monthly staff, meetings, monthly case, consultations, and monthly administrative support. I have also Contributed funds to merchandise (i.e. T-shirts) and staff are willing to use.

What do I need to change?

A present all of my team members are part time. Although wanted to have expressed interest in full-time work, most are comfortable with current schedule.

I am pioneering a "in a corn model" which enables all staff members to choose their hours, have flexibility over the schedule, determine how many hours they would like to work And have complete executive decision making over their schedule. Well, this is helpful and retention, from the financial standpoint this may not be sustainable. At present it is.

Nine building blocks for business model canvas (BMC):

1. *The customer segments*, who is the target audience?

-The target audience is the following:

Arleen- young adults-students

Marquia- young adults; military persons

Sarah- high level producers- business owners; entrepreneurs; return clients

2. *The value proposition*, what is it that I have to offer? what will I present to people that they will find value in? And be willing to buy the service?

-I can set up an appointment within 7 days.

-Guaranteed response within 12 hours.

-if we don't have what you need we will refer

3. *The channel*, communication and outreach. What type of promotion and advertisement. He used to get the message out? Second part, how will I deliver? How will I get my product/service to them?

-Psychologytoday.com [going good](#)

-Website blog writing need to step up in this arena. [Team is not interested even despite bonus option](#)

-Social media outlets- [IG just for outreach, not to be used with expectation to convert into clients](#)

-Community presentations done by sarah- [begin to send the team out to do more so I am not the face of the company anymore](#)

-bonus options offered to employees- [not really utilized- why?](#)

4. *The customer relationship*, how will I intend to build my relationship with my customers? Warm and friendly? Transactional in nature?

-Very friendly and calm. Minimize overly professional and/or academic banter unless it would benefit the client. I encourage family's to be present on the first session (for minors) and am willing to provide services to anyone in the family system depending on client request.



-“we can help you now, not later”

5. *The revenue streams*, how will I make money? How will I get paid?

-All transactions will be card based- through our system SimplePractice=Stripe

BACKSTAGE INFRASTRUCTURE

6. *The key resources*, what assets, tools, resources, equipment will I need to actually be able to deliver my service.

- simplepractice
- telehealth through simplepractice
- phone.com for intake calls
- wordpress for website

7. *Key activities*, core competency. What is it that I need to do better than anybody?

-setting an initial within 7 days

-if we can't help, we will point you in the right direction

8. *Key partnerships*, I can't do everything by myself.

-admin- phone calls, intakes, routing to appropriate clinician

-gusto for payroll

-heard for accounting

-score for business mentor

-group practice exchange and mastermind for group private practice owners.

9. *Cost structure*, what will I do to ensure a revenue stream is more than outgoing cost?

-private Pay only!