



Launch, Build, Scale: *Workbook*

*The Female Founder's Workbook for Moms
Redefining Financial Freedom*

CALCULATE YOUR FREEDOM NUMBER



1. INVENTORY YOUR CAPITAL

	Total
Savings	\$0.00
Partner Income (If applicable)	\$0.00
Emergency Funds / Brokerage Accts	\$0.00
Grants or Loans (If eligible)	\$0.00
Safe-to-use Debt (401K loan, low interest cards)	\$0.00
Total Expenses	\$0.00

2. LAY OUT YOUR EXPENSES

	Monthly Exp		Monthly Exp
Household / Living		Family / Personal	
Mortgage / Rent	\$0.00	Kids' Activities	\$0.00
Utilities (electric, water, gas, trash)	\$0.00	Healthcare	\$0.00
Groceries & Household Supplies	\$0.00	Clothing (kids + self)	\$0.00
Childcare / School Tuition / Fees	\$0.00	Subscriptions	\$0.00
Other (home services)	\$0.00	Self-Care	\$0.00
Transporation		Financial / Other	
Car Payment / Lease	\$0.00	Debt Payments	\$0.00
Gas / Insurance	\$0.00	Savings / Investments	\$0.00
Public Transit/Rideshare	\$0.00	Miscellaneous	\$0.00
Maintenance (repairs, registration, etc.)	\$0.00		
		Total Expenses (Monthly)	\$0.00
		Total Expenses (Annual)	\$0.00

CALCULATE YOUR FREEDOM NUMBER



3. IDENTIFY YOUR START UP COSTS

Setup / Legal		Marketing / Operations	
Business Registration / Licenses	\$0.00	Branding (logo, design, website)	\$0.00
Legal & Accounting Fees	\$0.00	Initial Marketing (ads, launch campaign, materials)	\$0.00
Insurance (gen liability, prof., etc.)	\$0.00	Software & Subscriptions	\$0.00
Permits / Certifications	\$0.00	Inventory / Supplies	\$0.00
Space / Equipment		People / Financial Cushion	
Office / Retail Lease or Deposit	\$0.00	Prof Svcs (bookkeeping, consultants, contractors)	\$0.00
Technology (computers, tablets, phones)	\$0.00	Payroll / Contractor Costs	\$0.00
IT Software / Setup	\$0.00	Training & Onboarding	\$0.00
Utilities Setup (internet, phone, electric)	\$0.00	Benefits Setup	\$0.00
		Working Capital (cash buffer for early months)	\$0.00
Total Start Up Costs			\$0.00

4. CALCULATE YOUR FREEDOM NUMBER

INVESTMENT CAPITAL (TOTAL)

\$0.00

X number of months of runway

EXPENSES

\$0.00 / mth

\$0.00 (X mths)

Must generate income by month X

START UP COSTS

\$0.00

CALCULATE YOUR TAM / ANTICIPATE THE MARKET



1. SIZE THE MARKET

Top-Down Method:

Bottom-Up Method:

Calculate:

Calculate:

2. MARKET DRIVERS

TAILWINDS

HEADWINDS

CALCULATE YOUR TAM / ANTICIPATE THE MARKET (PROMPTS)



1. SIZE THE MARKET

Top-Down Method:

- What industry?
- Is it a product or service?
- Buyer Demos - Segment, gender, income, etc.?
- What geographies?

Calculate:

- Start with the macro number
- Layer in the narrowing filters

Bottom-Up Method:

- Key stats from your buyer persona, i.e., age, income, geography, etc.
- How much will you charge for your product or service?
- Estimate the number of buyers?

Calculate:

- TAM = # of potential customers x average revenue per customer

2. MARKET DRIVERS

TAILWINDS

Consumer demand

- Are more people buying or needing this each year?

Tech adoption

- Are new tools/platforms making this cheaper, faster, or easier?

Demographics

- Is your audience growing in size, age, or purchasing power?

Behavioral shifts

- Are habits or expectations changing in a way that benefits you?

Regulatory / Macro

- Is government pushing adoption (mandates, subsidies, tax breaks)?

HEADWINDS

Consumer demand

- Are people abandoning this category or using alternatives?

Tech adoption

- Is innovation slowing down or being replaced?

Demographics

- Is your target market shrinking due to age, geography, or other shifts?

Behavioral shifts

- Are habits too ingrained to change (or reversing)?

Regulatory / Macro

- "Nice to have" or "Need to have"? Are rules making it harder or slower to operate?

Sell-Side Research

What it's good for:

- Market overviews and sizing
- Competitive analysis
- Risks and growth opportunities

Pro Tips:

Ask your friends in consulting, investing, banking and private equity for reports

Key firms:

Goldman Sachs, Morgan Stanley, J.P. Morgan, BofA, UBS, Jefferies,

Free/cheap subscriptions:

[Substack](#)
Seeking Alpha
Morningstar

Competitive Intel

What it's good for:

- Signals of strategy and investment

Pro Tips:

What to look for:

Hiring: roles, levels, locations (shows where the puck is going).

Product: release notes, customer testimonials, pricing, overall positioning

Tools that help:

Company's web/social presence, LinkedIn Jobs, general AI queries, industry pubs

Government & Multilaterals

What it's good for:

- Baseline stats
- TAM, macro tailwinds/headwinds

Pro Tips:

Where to look:

For US data:

- Census (demographics, firmographics),
- BLS (employment, wage),
- BEA (industry GDP),
- FTC/DOJ (enforcement trends).

For Global data: World Bank, IMF, OECD, UN Comtrade (trade flows), ITU (digital adoption), IEA (energy).

Trade Associations & NGOs

What it's good for:

- Adoption curves
- Industry average spending
- Customer demographics

Pro Tips:

Where to look:

- Sector-specific organizations publish surveys, forecasts, benchmarking PDFs.

Public Company Filings & Earnings

What it's good for:

- Revenue and growth trends
- Competitive landscape
- Pricing trends
- Go-to-market shifts

Pro Tips:

Where to look:

Edgar website (SEC company filings), websites, earnings calls / transcripts

What to look for:

Trends in the market, new product dev, customer sentiment, growth / profitability results, etc.

Private Company Breadcrumbs

What it's good for:

- Momentum signals
- Recent investments
- Overall category competition and growth

Pro Tips:

Where to look:

Press releases, funding databases, investor blogs, portfolio pages.

What to look for:

Trends in the market, new product dev, customer sentiment, growth / profitability results, etc.

IDENTIFYING YOUR MVP



1. IDENTIFY CORE PROBLEMS OF YOUR BUYER

Prompts for Completing:

- What are your ideal client/customer top 3 problems?
- What internal pressure (themselves, a boss, board or bottom line) is making them desperate for a fix?
- What product, service, consultant or workaround are they currently using to fix it?
- Why isn't that solution working?
- Why are they still stuck?

2. ALIGN CUSTOMER PAIN POINTS TO PRODUCT FEATURE

Pain Point	Feature	Nice to Have	Must Have
------------	---------	--------------	-----------

BUILD A BUYER PERSONA



1. WHO IS SHE

Age, Career/ Family Status:

Big Goal:

Big Problem:

What is Needed for Change?

2. PAIN POINT

What's the recurring problem that keeps bugging her—and would get her Googling for a solution (like yours)?

3. BUYING TRIGGER

What's the moment that pushes her over the edge to finally buy?

GATHER CUSTOMER FEEDBACK



IDENTIFY YOUR TARGETS (*current or potential customers*)

Name

Goal

<hr/>	<hr/>

NOTES

Your goal: 30 min to pitch your idea and get feedback; Questions to be asking:

- Would you be interested in learning more?
 - Through what vehicle?
- What's missing?
- What's confusing or unrealistic?
- How much would you pay for it?

ACTION ITEMS

DEFINE YOUR FINANCIAL NON-NEGOTIABLES



1. WHAT EXPENSES DO I REFUSE TO CUT?

2. WHAT'S OFF-LIMITS FOR BUSINESS FUNDING?

3. WHAT AMOUNT OF DEBT AM I WILLING TO TAKE ON TO FUND THE BUSINESS?

MUST DOs

HARD NOs

GO / NO GO CHECKLIST TO SWING BIG



Rules for swinging big at the right opportunity:

- You must answer “Yes” to Question 1 and 2
- You must also answer “Yes” to at least 2 more questions

01	IS THE OPPORTUNITY ALIGNED WITH YOUR CORE STRATEGY? <i>Consideration: Does this investment of time/money support or distract from your growth strategy?</i>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
02	DOES IT BUILD ON SOMETHING YOU ALREADY DO WELL? <i>Consideration: Does the investment allow you to leverage existing wins, skills, or competitive advantages your business has mastered?</i>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
03	DO YOU HAVE THE RESOURCES AND RESILIENCE TO SUSTAIN IT? <i>Consideration: Don't ignore the time/cost of integration. If traction takes twice as long as planned, it could be problematic to spend more than your business is generating.</i>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
04	DOES THE OPPORTUNITY SOLVE A PROBLEM THE MARKET CARES ABOUT NOW? <i>Consideration: A cool idea and great product are meaningless if timing is off.</i>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
05	ARE YOU BETTING MORE THAN YOU CAN AFFORD TO LOSE? <i>Consideration: What's the downside if it fails? Calculate the financial/strategic hit you might take if its not a wild success.</i>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
06	WILL THE OPPORTUNITY POSITION YOU BETTER COMPETITIVELY? <i>Consideration: If the opportunity creates separation, it's a green flag. If it puts you into a more crowded fight, it's a red flag.</i>	YES <input type="checkbox"/>	NO <input type="checkbox"/>
07	WILL YOU BE ABLE TO GAIN TRACTION WITH THE OPPORTUNITY IN 30-90 DAYS? <i>Consideration: Have you defined the earliest signal of success (or failure)? Can you see traction in 30–90 days?</i>	YES <input type="checkbox"/>	NO <input type="checkbox"/>

Strategy

- Market sizing/direction
- Competitive analysis
- Must have initial investments
- Scaling to maximize growth
- Scaling to sell your business

Advisor Targets:

Not a “Yes” woman / man; someone who challenges you to scale, to rethink your market, and to stretch beyond your comfort zone. Even if you only agree with 10% of their feedback, that 10% could be the key that moves you forward.

Financial Skills

- Budgeting
- Fundraising
- Managing cash flow
- Forecasting

Advisor Targets:

Everyone knows an accountant, whether it’s a friend, a cousin, or your brother-in-law. Find that person and keep them on speed dial.

Marketing & Branding

- Branding and Presence
- Digital marketing
- Customer retention
- PR
- Website and SEO Optimization

Advisor Targets:

This is a rotational role as your business evolves. As it matures and grows, you’ll need to test different strategies to drive top-line growth. Stay nimble and always keep an eye out for who can step into this role next.

Sales

- Strategy/execution
- Lead gen activities
- Pitch/proposal writing
- CRMs and other tools
- Partnerships

Advisor Targets:

You’ll lean on this person more times than you can count—usually at the most inconvenient moments. That’s why it’s smart to line up a backup, because the day you can’t reach them will be the day you really, really need them.

Product

- Product-market fit
- Prototyping
- Pricing
- Supply chain

Advisor Targets:

This is where connecting with another entrepreneur who’s truly been through it makes all the difference. A well-meaning corporate friend at a big company may not fully relate to the scrappy, small-batch challenges you’re facing.

Legal & Risk Management

- Trademark/Patents
- Standard contracts
- Legal fine print to watch out for
- Insurance and risk management

Advisor Targets:

Just like with an accountant, everyone has one of these in their orbit. Keep them close, focus your questions, and don’t be afraid to pay for their time when the situation calls for it.

KITCHEN CABINET MATRIX



Strategy

- Market sizing/direction
- Competitive analysis
- Must have initial investments
- Scaling to maximize growth
- Scaling to sell your business

Financial Skills

- Budgeting
- Fundraising
- Managing cash flow
- Forecasting

Marketing & Branding

- Branding and Presence
- Digital marketing
- Customer retention
- PR
- Website and SEO Optimization

ADVISORS

Name	Skill
_____	_____
_____	_____
_____	_____
_____	_____

ADVISORS

Name	Skill
_____	_____
_____	_____
_____	_____
_____	_____

ADVISORS

Name	Skill
_____	_____
_____	_____
_____	_____
_____	_____

Sales

- Strategy/execution
- Lead gen activities
- Pitch/proposal writing
- CRMs and other tools
- Partnerships

Product

- Product-market fit
- Prototyping
- Pricing
- Supply chain

Legal & Risk Management

- Trademark/Patents
- Standard contracts
- Legal fine print to watch out for
- Insurance and risk management

ADVISORS

Name	Skill
_____	_____
_____	_____
_____	_____
_____	_____

ADVISORS

Name	Skill
_____	_____
_____	_____
_____	_____
_____	_____

ADVISORS

Name	Skill
_____	_____
_____	_____
_____	_____
_____	_____

KITCHEN CABINET INTELLIGENCE



KEY QUESTIONS

Prompts / Example Queries:

- How did you determine your pricing strategy?
 - What system or process made the biggest difference for you?
 - What was your first big hire?
 - How did you know it was time to scale?
-

NOTES

ACTION ITEMS

YELLOW

EMPLOYEES

- 
- ⚠ More complaints, fewer compliments
 - ⚠ Energy shifting; scrappy excitement --> “grinding it out.”
 - ⚠ Your original North Star gets fuzzy or keeps changing

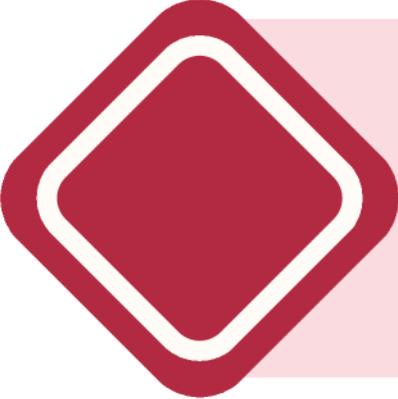
ORANGE

CUSTOMERS / SALES

- 
- ⚠ Sales cycle lengthening
 - ⚠ Pricing power disappearing
 - ⚠ Increasing attrition; rising costs to acquire or keep

RED

FINANCIALS

- 
- ⚠ Numbers flatlining: growth curve looks like a straight line
 - ⚠ Burn rate outpacing revenue
 - ⚠ Juggling payables or delaying hires

Recurring Revenue

(MRR)

Current MRR: _____

- % of revenue that's recurring vs. one-time?
- Where could we turn one-time buyers into subscriptions or retainers?
- How confident am I that this revenue is predictable next quarter?

Action Item: Identify 1-3 ways to increase recurring revenue this quarter.

How predictable is your revenue?



Customer Lifetime

Value (LTV)

Current LTV: _____

- What is the LTV for my average customer?
- What could we upsell / cross-sell or extend to raise LTV?
- Are we prioritizing high-value accounts?

Action Item: List 2-3 strategies to increase CLV this year.

Is your CAC sustainable?



Customer Acquisition

Cost (CAC)

Current CAC: _____

- What's the all-in cost to land one customer?
- Are these costs trending up or down as we grow?
- What's our ROI on sales and marketing efforts?

Action Item: Track CAC monthly and identify the top 1-2 areas to optimize.

Are you maximizing the value of each customer?



Gross Margin

Current Gross Margin %: _____

- What are my direct costs per product/service?
- Biggest cost drivers lowering margin?
- Which offerings or customer segments have the best margins?

Action Item: Identify 1-2 cost-saving or efficiency improvements to increase margin.

How strong is your gross margin?



Churn Rate

Current Churn %: _____

- What % of customers left in the last 30–90 days?
- What reasons are most common for leaving?
- First move to improve retention right now?

Action Item: Implement 1-2 initiatives to improve retention this quarter

How concerned should you be about churn?



Burn Rate

Current Burn Rate: _____

- If unprofitable, how many months of runway remain?
- If profitable, how steady is cash flow month-to-month?
- One lever we could pull to cut unnecessary burn or smooth cash flow?

Action Item: Set a burn rate target and track weekly. Identify unnecessary expenses to cut.

How sustainable is your burn rate?

