

BRIDGING THE FUNDING GAP

A Business Plan for Women's Inclusive Entrepreneurship

MEET THE TEAM



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GOALS

- **Narrow the funding gap** for women and minority entrepreneurs
- **Enhance education and training** for diverse founders
- **Strengthen the entrepreneurial ecosystem** through mentorship and resources
- **Increase visibility** for diverse founders and fund managers
- **Promote equity and inclusion** in the entrepreneurial ecosystem
- **Empower underrepresented founders** to thrive and build wealth
- **Drive innovation** through a more diverse and inclusive talent pool

AGENDA

- Problem Solving Strategy & Business Description
- Marketing Strategy
- Financial overview
- Risk Assessment
- Future Initiatives

DEFINING THE VISION

Building a Business for Impact



01 Define the Problem

Women and minority entrepreneurs lack access to funding, mentorship, and investor networks, limiting growth opportunities.



02 Break Down the Problem

Challenges include financial literacy gaps, insufficient mentorship, and biases in investment decisions.



03 Prioritize Issues

UBS will first launch financial literacy programs, then expand mentorship, and later establish long-term funding solutions.



04 Develop Hypotheses

Investment-readiness training, mentorship, and shifting media narratives will improve funding success for underrepresented entrepreneurs.



PROBLEM SOLVING FRAMEWORK



Analyze Data 05

Key metrics like funding rates, mentorship effectiveness, and investor engagement will be tracked and analyzed.



Synthesize Findings 06

Data confirms financial education, mentorship, and media representation significantly improve access to capital.



Communicate to Stakeholders 07

UBS will execute research, pilot programs, and mentorship expansion while monitoring progress through reports and dashboards.



ElevateHER

Service Description

ElevateHER empowers underrepresented women entrepreneurs with financial literacy, investment-readiness training, and mentorship, bridging the gap between women-led startups and funding opportunities.



Mission Statement

ElevateHER closes the funding gap for women entrepreneurs through education, mentorship, and capital access, fostering economic inclusion and long-term wealth creation.



Business Goals

Short-Term: Train 500 women, host 5 financial literacy events, and secure funding for 100 participants in year one.

Long-Term: Expand to five cities, increase funding success rates by 30%, and launch a digital education platform within 5 years.



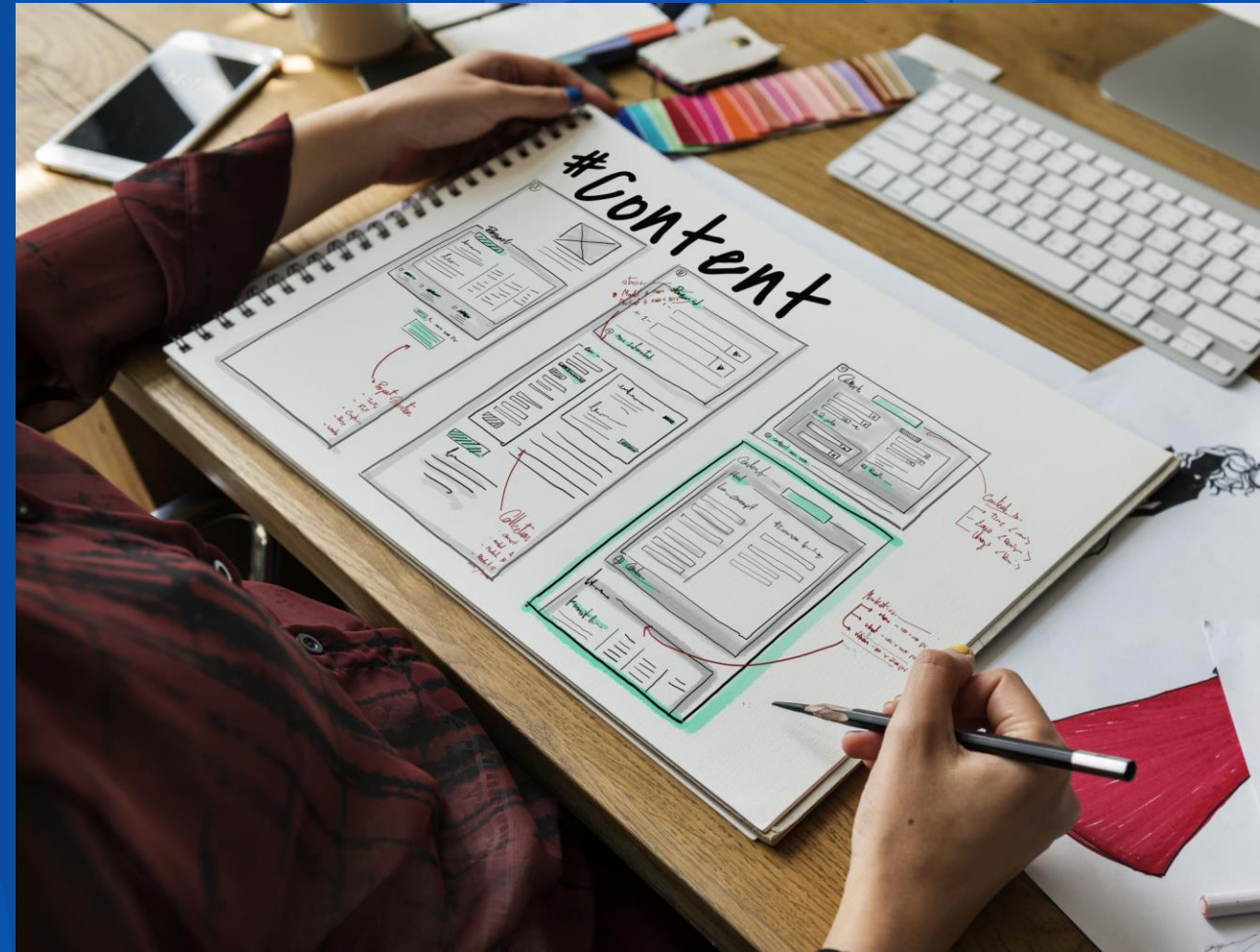
Competitive Advantage

ElevateHER offers direct funding access, exclusive investor networking, and hands-on mentorship, backed by UBS's credibility, financial expertise, and data-driven strategies.



UNLOCKING NEW HORIZONS

Marketing Strategy



STEPPS Marketing Strategy

Social
Currency

S

Exclusive benefits and networking opportunities for consumers, as well as personalized check-ins and interactions.

Triggers

T

Link this service to statistical evidence and entrepreneurship industry-specific trends.

Emotion

E

Use successful case studies that incorporate statistical evidence and personal stories of triumph over obstacles for female entrepreneurs.

Public

P

Utilize social media like Instagram and Youtube to share their stories and publicize the service and its success to others.

Practical
Value

P

Being specific about how the service provides opportunities for female entrepreneurs and the benefits of being within the networking and mentoring community.

Story

S

Tying these into a cohesive story with clear outcomes and figureheads that can be the face of the program.

Target Persona

"ATTRACT"

Success stories from those that have benefited from our team's strategy, a clear structure and organized system with tangible benefits, and educational engagement options.



FEMALE



AGES 20-50



ALL EDUCATION LEVELS

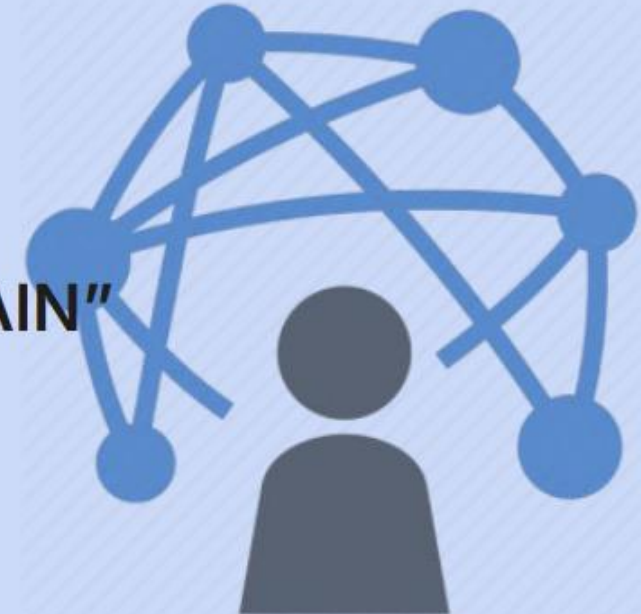


"ENGAGE"

Creating content on social media, virtual events/webinars, in-person networking/educational events

Building a networking system that connects them with other similar consumers, providing personalized follow-ups and check-ins, and ensuring there are benefits to continuing with my campaign in order to establish a mutual relationship.

"RETAIN"



FUNDING THE FUTURE

Financial Analysis



SMART BUDGET GOALS

\$950K Budget from Y1- Y3

Specific

Over the next 3 years, ElevateHER will invest \$950K to support women entrepreneurs through financial literacy, mentorship, and capital access. We aim to host 55+ networking and educational events, and award at least seven \$25K grants to women-led startups. Additionally, we will develop a digital education platform, grow our mentorship network, and foster partnerships with investors to ensure long-term financial independence for women entrepreneurs.

Measurable

The initiative will be tracked through key milestones, including the number of events hosted, grants awarded, and entrepreneurs reached. By the end of 2028, we will have spent \$950K, ensuring measurable impact through financial literacy programs, mentorship pairings, and increased access to capital.

Attainable

Our budget is structured to scale gradually, ensuring financial attainability while adapting to program needs. The funding supports events, grants, business development, digital education, marketing, and team expansion. Utilizing strategic collaborations, including UBS's established programs and partnerships, we will maximize our impact.

Relevant

ElevateHER aligns with UBS's commitment to financial inclusion, leveraging its expertise in wealth management to support underrepresented entrepreneurs. By expanding mentorship, financial education, and funding opportunities, we address systemic barriers to capital access for women entrepreneurs. This initiative strengthens UBS's impact while fostering a more inclusive entrepreneurial ecosystem.

Time-based

ElevateHER will achieve long-term goals by 12/31/2028. This timeline allows for sustainable growth and scalability, ensuring long-term access to resources and financial empowerment for women.

KPI FRAMEWORK

Business Objective

Increase access to capital for women entrepreneurs

Build an inclusive entrepreneurial ecosystem through mentorship and training

Scale ElevateHER to multiple countries

Goals

Enhance funding opportunities and financial support for women founders

Foster collaboration, mentorship, and visibility for women entrepreneurs

Expand ElevateHER's global reach into underrepresented communities

KPI's

Capital secured by women entrepreneurs

grants awarded for start up businesses

a large amount of mentorship pairings

frequent training sessions for women entrepreneurs

expansion into new countries

growth in partnerships and international collaborations

Metrics

\$ amount of investments into women's startups

Number of investors securing grants

Number of training sessions

High satisfactory levels of mentees

Number of mentorship pairings

%Increase in international participation

Number of ElevateHER programs in new regions

MANAGING UNCERTAINTIES

Risk & Change Management



RISK MANAGEMENT MATRIX

Risk 1

Financial losses from investing \$43 million into ElevateHER project support

Major risk, 26-60%

Mitigation Technique

Create a cash management strategy

Risk 2

Global Risk: ElevateHER plans to expand into 5+ countries. Changes in government policy, exchange rates, foreign economies, social unrest, cybersecurity threats, public health, and other factors make global risk a major consideration for expanding our support to other countries.

Moderate risk, 25-60%

Mitigation Technique

We can strategize the selected foreign companies and entrepreneurs we support by considering the political, economic, and overall stability of the countries they are based in.

Risk 3

Liquidity risk: start-up companies and entrepreneurs we support may not be able to repay short term assets.

Minor risk, 0-25%

Mitigation Technique

Encourage supported entrepreneurs and companies to carry insurance policies covering financial risks.

CHANGE MANAGEMENT STRATEGY: ADKAR

Current

1. **Awareness**
 - Communicate reasons for ElevateHER program to ALL UBS employees to generate full transparency and company-wide awareness
 - Highlight benefits of ElevateHER programs and goals
2. **Desire**
 - Explain how ElevateHER program will benefit women UBS employees, through career growth opportunities and overall healthier work-life balance
 - Appoint influential women employees as “change agents/champions” who buy in to ElevateHER goals and can encourage peers to embrace new program

Transition

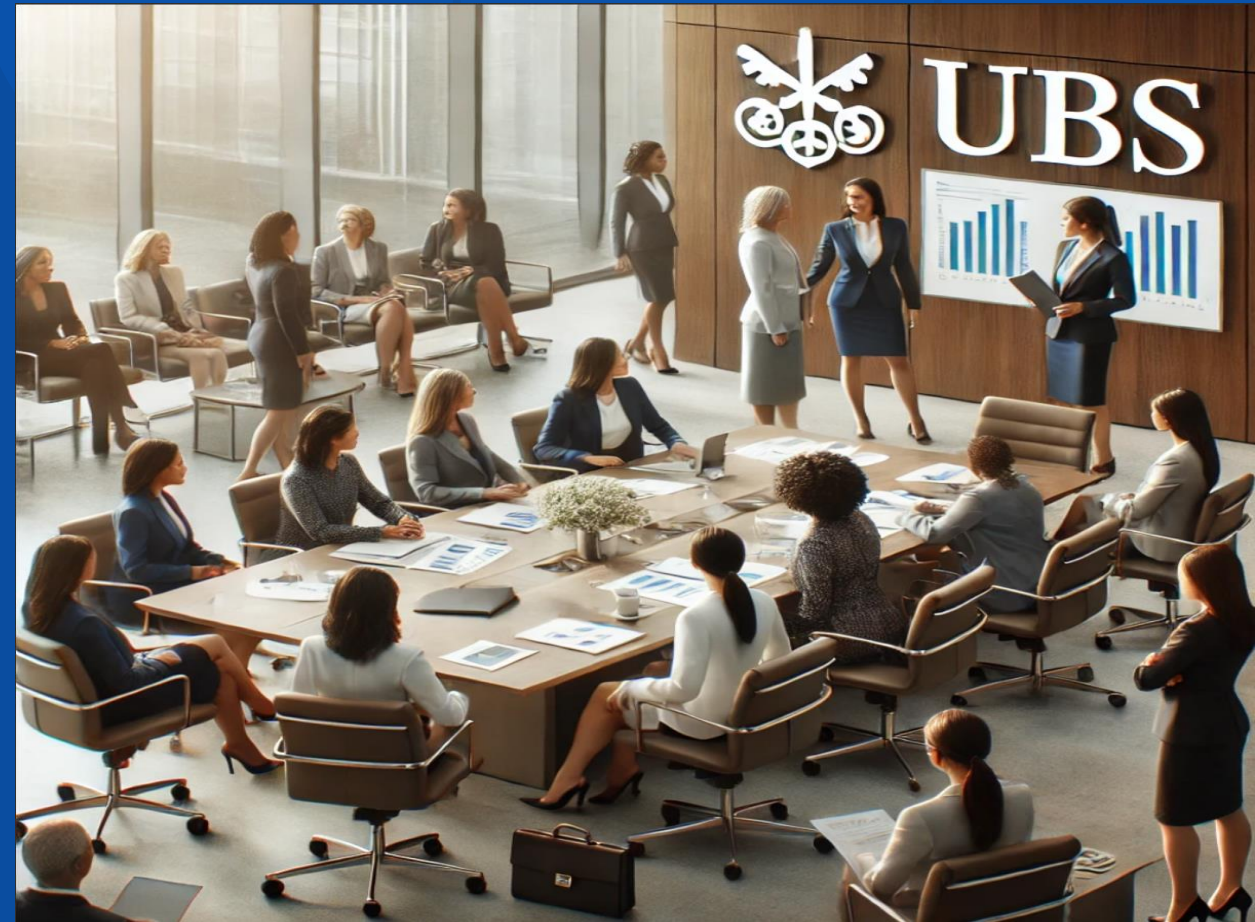
1. **Knowledge**
 - Provide employees with bimonthly informational updates on progress of ElevateHER goals
 - Empower employees to participate in applicable programs
2. **Ability**
 - Offer mentorship and coaching resources who can guide employees to follow through on ElevateHER goals

Future

1. **Reinforcement**
 - Acknowledge and reward employees who have successfully supported ElevateHER’s program goals through formal recognition, incentives, or praise
 - Align company culture to support theme of women entrepreneurship

STRENGTHENING OUR IMPACT

Future Initiatives



USER JOURNEY MAP

CONVERSION

- Highlight alumni success
- Advertise funding opportunities

CONSIDERATION

- Time Commitment
- Exclusivity
- Potential Payoff

LOYALTY

- Strong alumni network
- "Pay it forward" mindset

AWARENESS

- Marketing Emails
- Networking Events
- Popularized on UBS website

ADOVOCACY

- Strong social media, LinkedIn presence
- Incentivize alumni referrals

Supplier:
ElevateHer

Customer

Product Family

- Funding opportunities for **underrepresented** entrepreneurs

Current State

- Lack of resources for women, need more knowledge

Future State

- Global scale , ElevateHER will be multinational with successful funding
- **Information** for how to be successful as a woman in entrepreneurship

Plan

- Start small with one cohort at one company, before gradually expanding to several companies, increased funding, and a multinational scale

Thank
you