

# Identifying Provider Needs For a B2B/B2C Matchmaking Platform



**VOCES VITALES**  
C O S T A R I C A

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## ABSTRACT

The team conducted a needs assessment for the mentor base of Voces Vitales Costa Rica (VVCR). This organization, focusing on ethical professionalism, inclusion, gender identity, and non-violent communication, plans to launch a platform connecting its 1,100 certified mentors with businesses and individuals to broaden their regional impact. Our study involved analyzing similar platforms, identifying user needs, and determining desired features for the proposed hub. We gathered insights through surveys, interviews, and focus groups, providing VVCR with a prioritized list of features and implementation strategies for a user-centric hub.

## Women in Leadership: Bridging Gaps for Lasting Change in San Jose

Tackling global challenges necessitates leaders with the practical skills to devise strategic plans that can uplift entire communities. However, there is a notable deficit in leadership capable of driving social change, especially in combating sexism or misogyny, where the representation of women in pivotal roles is essential. The development of leadership skills and opportunities for women is critical for breaking down sexist barriers and enhancing societal awareness. Moreover, the significance of women's leadership transcends societal improvement, as highlighted by research from the McKinsey Global Institute, which found a direct link between gender equality and improved economic performance<sup>1</sup>. Additionally, a similar study found that companies with gender-diverse executive teams are up to 21% more likely to achieve above-average profitability, underscoring the economic benefits of gender diversity in leadership positions<sup>2</sup>.

Unfortunately, gender equality is not the norm in the professional world. Women held only 28% of managerial positions globally in 2019, this statistic only worsens as consider at higher-level decision-making positions. A survey conducted by the International Labor Organization in 2018 found that 48% of companies surveyed had at least one woman in senior management, and only 31% had women in top executive positions. Female CEOs are even rarer: only 18% of enterprises surveyed by the World Bank had a female CEO, and women accounted for only 7.4% of CEOs at Fortune 500 corporations<sup>3</sup>. Costa Rica, however, is an outlier in terms of gender equality. According to The World Bank, 45.9% of those employed in senior and middle management in Costa Rica in 2022 were women<sup>4</sup>.

## Vital Voices Unveiled: Catalyzing Progress

Vital Voices Global Partnership (VV) actively works to eliminate gender disparities in leadership worldwide. Operating in 146 countries and impacting over 14,000 women, VV adheres to the mantra, "Investing in women transforms the world"<sup>5</sup>. Branches of Vital Voices worldwide tailor their efforts to address region-specific challenges. For instance, Vital Voices Ukraine channels its focus into providing emergency funding for displaced women, reflecting the urgent needs in its context.<sup>6</sup> Conversely, due to the relatively secure setting in Costa Rica, Voces Vitales Costa Rica (VVCR) focuses on issues of lesser urgency. VVCR is dedicated to fostering non-violent communication, women's empowerment, and social consciousness.<sup>7</sup> They achieve these goals by providing training courses, workshops, and ultimately, certifications to business professionals.

## Existing Challenges in Empowering Women Leaders

VVCR, a global partnership with a team of about 12 individuals, faces significant challenges in achieving national-scale impact due to its small size and limited resources. Despite its aspirations to infuse the workforce and society with its core principles of diversity, collaboration, tolerance, and respect, VVCR's current scale restricts its ability to widely disseminate these values. This limitation hinders the organization's mission of promoting inclusive and diverse viewpoints within workplace environments, leaving a considerable segment of the working population untouched by its transformative principles, like conscious leadership and the empowerment of women. Consequently, the lack of widespread adoption of these ideals results in a scarcity of inclusive perspectives, undermining innovation and the richness of dialogue that diversity brings.

The organization's efforts to equip participants with skills for workplace advancement and social consciousness through its mentorship training program showcase its commitment to its values. However, VVCR's constrained scope not only affects its organizational footprint but also stunts the potential for broader societal evolution toward a more equitable and inclusive environment. This underscores the urgency for VVCR to overcome its scale limitations, not merely to expand its reach but to truly fulfill its vision of contributing to a societal shift towards gender equality and conscious leadership, thereby effecting meaningful change in societal norms and values.

## Addressing Empowerment through an Online Hub

This project aimed to analyze potential stakeholders in an online hub connecting freelance, VVCR-trained mentors with clients. Platforms like Airbnb, LinkedIn, and BetterHelp provide an online space where clients and verified providers can find each other. VVCR's goal is to create a similar space, matching client's needs to trained consultants. To do this, we focused on identifying qualities and features that attracted their mentors to this online hub. By establishing this service hub, VVCR aims to expand its ability to empower women in business leadership and support its trained mentors. Figure 1 illustrates how the VVCR hub will be incorporated into their current business model. VVCR plans to take a percentage of each transaction done on the hub to generate revenue.

## Setting the Stage for VVCR's Journey and Business Landscape

VVCR aims to capitalize on its robust mentor base of 1,100 professionals to drive the success of its new online service hub, focusing on creating a platform that appeals to its diverse mentor population, including client and business service providers. By analyzing transaction modalities, direct competitor strategies, and the features of contemporary platforms, VVCR seeks to identify and implement design elements that ensure widespread adoption among mentors and facilitate meaningful connections with clients. This comprehensive approach, from understanding the specific services offered by mentors to exploring successful features in existing platforms, aims to address the "cold start" problem, ensuring both mentors and clients are engaged from the launch. The end goal is to build a user-friendly, efficient platform that stands out in the market by enabling mentors to effectively showcase their services and clients to easily find the guidance they need, setting a new benchmark for online service hubs in the mentoring sector.

## The Cold Start Problem

A major challenge that must be addressed when launching matchmaking networks such as the one proposed in this paper is something commonly referred to as the "cold start" problem. When launching a new service with the value proposition of connecting members from two parties (in this case, mentors and clients), both parties must be willing to begin using the service simultaneously, otherwise, no matches can be made; if only mentors adopt the service, then they will have no clients, and if only clients adopt the service then there will be no mentors to hire. The cold start problem references the difficulty of getting a platform of this nature off the ground, since it provides less value to either party without the significant presence of the other, causing many similar platforms to fail on launch.

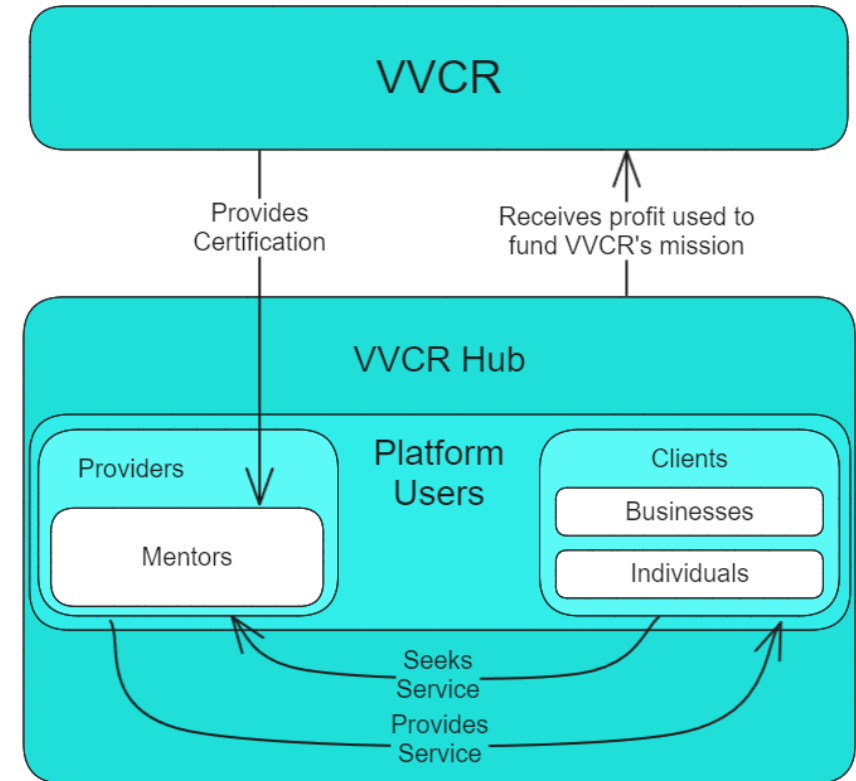


Figure 1: This flowchart shows the relationship between VVCR, the VVCR hub, providers, and clients.



## VVCR Provider Profile

One of VVCR's main objectives in the creation of this hub is creating value for potential providers to encourage use. While providers can potentially come from any source, VVCR is looking for the bulk of their initial users to come from their existing mentor base. VVCR has trained 1,100 mentors in their values, as seen in Figure 2, about two-thirds of which provide freelance consulting services.<sup>7</sup> Their research aims to identify the aspects of hub design that are most conducive to widespread adoption by this mentor base. Understanding the breakdown of services these mentors provide is crucial to the design of the hub.

Many working mentors do personal training, in various life skills. They are primarily split between two major subgroups, personal and professional advising. The professional mentors are made up of financial advisors, personal development, branding, and leadership coaches. The personal mentors are psychologists, experts in non-violent communication, life coaches in mindfulness, personal health, community and familial empowerment. The professionally focused mentors make up a greater majority, although many of them have a background focus on life coaching.

## Transaction Modality for Competitor Differentiation

Employee assistance platforms and individual mentorship providers differentiate themselves based on the type of transaction they handle. Providers have the option for primarily B2B (Business-to-Business), or B2C (Business-to-Client) transactions, or to try to handle both. B2B relationships are harder to establish, for it takes a while and there is intense competition to have a repeat relationship with a major company because of the stability of work it ensures. They can be a valuable source of income for larger companies, while more difficult for individual providers. They take a different type of mentorship, manifesting in group sessions much more frequently than working with an individual client. Also required is a willingness to handle bureaucracy, often requiring a lot of paperwork and politics to initially establish. B2C transactions are less profitable individually, but can be easier to establish, more personal and longer-term, lower effort relationships.

## Direct Competitor Analysis

One of the direct competitors to VVCR in the region is EAP Latina (Employee Assistance Program), a much bigger company. They operate in over 20 countries and have over 2000 trained professionals. They handle exclusively B2B (Business-to-Business) work, have 700 clients, and have worked with over 3 million people.<sup>8</sup> EAP functions as an employer rather than a matching hub, meaning the client is not given input on which professional they'd like to work with. Potential clients select a desired service, at which point EAP chooses and sends in a certified professional who specializes in that service type. In case the user isn't satisfied with the provider, EAP provides a partial refund and sends in another professional. It establishes repeat clients by building trust in the platform rather than a relationship with individual professionals. Their providers focus primarily on mental-health and quality of life services. They employ psychologists, nutritionists, mindfulness professionals, communication, and diversity and inclusion educators. As well as mental health, they also have a focus on professional development. This includes financial and legal advice, as well as leadership and branding coaching. They don't have any specific social values or problems they focus on and appear to be mostly concerned with addressing employee health for the smooth operation of companies.

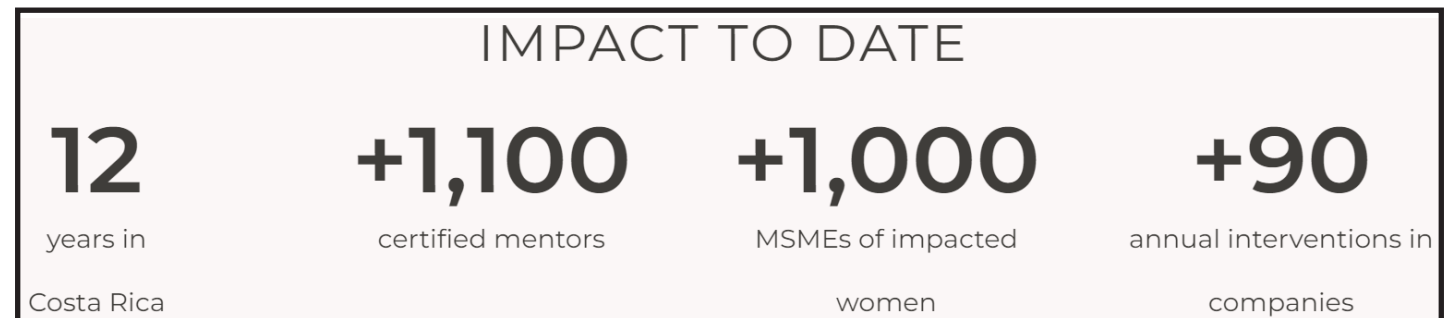


Figure 2: This photo from VVCR's website shows their regional impact to date<sup>9</sup>.

# Contemporary Platform Feature Analysis

During our research of existing marketplace platforms, we identified three types of service that a platform provides. These types are not strictly defined but instead serve as a framework for discussing the overall platform experience from the provider’s point of view; these platform types are primarily differentiated by the level of involvement the platform has in formation of new matches between providers and clients, the activity of a provider providing service to a client, payment handling between parties, and recording the reputation of users.

Figure 3: Comparison of features offered on 15 different platforms.

Color Key		Advertising hub															
		Marketplace															
		Pseudo-employer															
		✓ = Has feature															
		• = Has partial feature															
		Craigslist	FB Marketplace	Instagram	LinkedIn	Psychology Today	Airbnb	Amazon MTurk	Amazon Retail	Expedia	Fiverr	HuliHealth	Taskrabbitt	Upwork	Uber	BetterHelp	VVCR Hub
Match Initiation	Profile Analytics			✓	✓	✓	✓		✓		✓		✓	✓			
	Client Profiles		✓	✓	✓						•					•	
	Promoted Placement		✓	✓	✓	•			✓	✓	✓		•	✓			
	Sort By Distance	✓	✓		✓	✓	✓			✓		✓					
Facilitate services	Categorical Search	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓
	In-App Messaging		✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓	✓	
	In-App Scheduling					✓	✓			✓		✓	✓		✓	✓	
	In-App Payment						✓	✓	✓	✓	✓		✓	✓	✓	✓	
	Cancellation Fee						✓			✓			✓	•			
	User Protections						✓	✓	✓	✓	✓	✓			✓	✓	✓
Post-service	Platform Rates Providers					✓						✓		✓	✓	✓	✓
	Clients Rate Providers						✓		✓	✓	✓	✓	✓	✓	✓		✓
	Providers Rate Clients						✓	✓					✓	✓	✓		✓
	Mobile App	✓	✓	✓	✓	•	✓		✓	✓	✓		✓	✓	✓	✓	✓

**Advertising Hub** platforms serve only as a place for clients and providers to voluntarily connect and network. Typically, this type of platform only has features allowing users to identify themselves and the services they provide—such as user profiles—as well as providing a way to find each other via a search engine or match suggestions. LinkedIn and Psychology Today are examples of this platform type, both only having features to allow users to connect with each other.

**Marketplace** platforms usually have many of the same features as an Advertising Hub such as user profiles, with the addition of features that facilitate the logistics of providers working with clients. These additional features may include scheduling services, or payment directly through the platform. Marketplace-type platforms typically also include a method for clients to give feedback to providers and view the reputation of providers in the form of a quantitative rating or a qualitative review.

**Pseudo-Employer** platforms as implied by the name, function almost identically to typical employers from the provider’s perspective, entirely dictating which clients are available to which providers, and at what rate providers are compensated for their

services provided. From the client’s perspective, Pseudo-Employer platforms also more closely resemble a single business, instead of a network of individual providers, offering generic rates across providers and very little control over which provider the client receives service from.

VVCR can adopt many of the features that existing online hubs have demonstrated, shown in Figure 3. Mentors will be able to create accounts on VVCR’s hub and demonstrate their qualities, offerings, skills, and experience. Mentors can also be like the hosts on Airbnb by setting their own prices and having control of their own services. Mentors can also include photos of their previous work and what they promise to come out of their client training like how Airbnb hosts display their houses to guests. VVCR’s online hub would be the main pipeline that connects mentors with clients while charging both sides a fee. VVCR’s clients can also create accounts through the online hub. The clients can also look for mentors that fit their needs and find all the information about the mentors through this online hub.

## Methods

This project was designed to enhance Voces Vitales Costa Rica's (VVCR) capacity to attract mentors to its online matchmaking hub. Initially, the team deployed a refined survey to existing and potential mentors to identify their needs, preferences, and the features they found most compelling in an online service hub. Analysis of the survey data informed the development of a preliminary framework for the hub, emphasizing attributes that maximized mentor engagement and participation. Based on these insights, the team explored further through interviews and focus groups, deepening our understanding of mentor expectations and the functionality of similar platforms.

Simultaneously, an investigation of successful online service hubs like LinkedIn, BetterHelp, and Airbnb is conducted. Our research led to the customization of best practices and strategies that meet VVCR's specific requirements. Through the analysis and discussion of features from these platforms, we set a standard for what contributes to their effectiveness. This strategic approach is designed to create a compelling and engaging online environment that not only attracts but also retains high-quality mentors. By doing so, VVCR's impact and presence within its sector can be expanded, ensuring a vibrant community of support and growth.

## Problem Statement

VVCR aims to create an online space where mentors and clients can find each other. The mentor base will be comprised of VVCR certified professionals who offer their services. Every service provider must be trained in VVCR's values; although this will require a lengthier vetting system, this ensures that clients have a diverse and open-minded mentor base to choose from. Additionally, there is a need to streamline the diverse services offered by small and medium enterprises (SMEs) through group advertising, emulating the impact of large EAPs. To achieve these objectives, the team must help VVCR in gathering essential data on mentor offerings and preferences forming the foundation for a successful online mentorship ecosystem.

## Project Goals

We proposed to attract mentors to this online training hub by completing the following objectives and answering the following research questions:

### Objectives:

1. Assess the needs and identify features that will be attractive to potential mentors using an online service hub.
2. Find out what value online service hubs such as Airbnb and BetterHelp provide to users.
3. Compare what online service hubs can do as well as what mentors want, and then make recommendations to VVCR on how they can make an optimal hub.

### Research Questions:

1. How can we maximize the benefits this hub provides for VVCR, from a financial/expansion standpoint?
2. How can we maximize the benefits this hub provides for mentors who would provide their services on this hub?
3. What design elements present in similar online hubs lead to maximized usability?
4. How will this hub overcome the 'cold start' problem?

## Our project achieved these three objectives by:

1. Partnering with VVCR to enhance the survey's structure and questions, focusing on preferences for an online service hub.
2. Examining survey responses to identify themes, then conducting interviews and focus groups to understand mentors' readiness for a new platform.
3. Investigating platforms like Airbnb and BetterHelp for insights into user attraction and retention strategies applicable to VVCR's hub.

In the end, we compiled all our research and findings to propose the necessary features and incentives that can attract mentors to the hub.

## Data Collection

The VVCR mentor survey was sent to the mentor base of about 1,100 people to gather insights and information on hubs. It is a survey that VVCR and our team designed to gain awareness on how to attract mentors to a hub that connects them with clients. The survey was also used to gather information on the services that the mentors can provide. Many of the questions were geared to gather general information on what the mentors could provide and how they can provide their services. Financial, demographic, and work history were gathered through the VVCR mentor survey as well. Questions relating to a hub were asked, such as (Original questions and options shown in Appendix C in the Supplementary file).

While survey responses poured in, interviews and focus groups were conducted with mentors that expressed interest in a hub. Interview questions were intended to address the main features that VVCR could incorporate into their hub to make it appealing. Interview responses were compiled in a Google Form, and with participants' consent, both interviews and focus groups were recorded to guarantee the retention of information. Through interviews, the team aimed to understand mentor services and how they are delivered and advertised, pictured in Figure 4. We also wanted to gauge the willingness of mentors to be involved in a platform. Data was collected on the mentor's relationship with their clients, how they sell it, how they relate, and how they bring their expertise to the real world. Focus groups provided a chance to observe conversations among mentors. Each group member was tasked with identifying at least five insights from the focus groups and connecting them to our initial observations. Although we had guiding questions ready, it was crucial that we prioritized listening over speaking in these discussions.

## Our project answered these research questions by:

We conducted market research to identify gaps, examined existing online service hubs, refined survey questions, analyzed survey results, studied incentives in similar business models, and researched competitors like EAP Latina. By pinpointing market gaps, we assisted VVCR in recognizing opportunities, enabling them to disrupt the industry and foster accelerated growth. Our recommendations will guide VVCR in designing a future online hub and attracting mentors to utilize their training platform.

1. Do you want to broaden your client enterprise?
2. What is the motive for not wanting to broaden your client/corporate network?
3. How are you currently connected to clients? Do you find clients through direct contacts or referrals from previous clients? Or both?
4. Which of the following services do you have the capability of offering?
5. To whom do you want to offer these services?
6. What kind of services can you offer? What is your location?
7. How would you be able to provide the services?
8. Are you willing to offer a free trial of your services on the VVCR hub?
9. Service Description: Alternatively, provide a brief description of the services you offer online (optional).
10. Initiative Interest: Are you interested in receiving further information about this initiative?



## Research Design and Data Analysis

Our research design focused on enhancing VVCR's online hub to attract mentors by understanding their motivations, challenges, and preferences for service hub features. Through a combination of quantitative and qualitative survey methods, we aimed to gather high-response data to analyze mentor interests and identify key features that could improve the hub's appeal. This approach ensured ease of survey completion, making for insightful data collection.

The initial phase involved analyzing survey data to spot recurring themes and preferences, tools like Google Sheets were used for real-time data collection<sup>9</sup> and Microsoft Excel for in-depth analysis, including histograms and line graphs to visualize response trends. This process not only highlighted the most valued aspects of potential hub features but also narrowed down our focus to a concise list of recommendations.

Built on these insights, our project evolved to refine these initial findings into a detailed recommendation and mockup, directly informed by the data gathered. The analysis was enriched with interviews and focus groups and provided a deeper understanding of mentor needs and expectations. This qualitative feedback complemented our survey analysis, thus enabling us to tailor the hub's design to match mentor preferences effectively.

The culmination of this research was actionable recommendations for VVCR, focused on features that appeal to mentors. Additionally, the insights gained will guide VVCR in conducting similar research with potential clients, applying best practices learned from our research to ensure efficient and effective data gathering. This comprehensive approach ensured that our recommendations were not only based on quantitative data but were also informed by qualitative insights; this offered a well-rounded strategy for enhancing VVCR's online training hub.

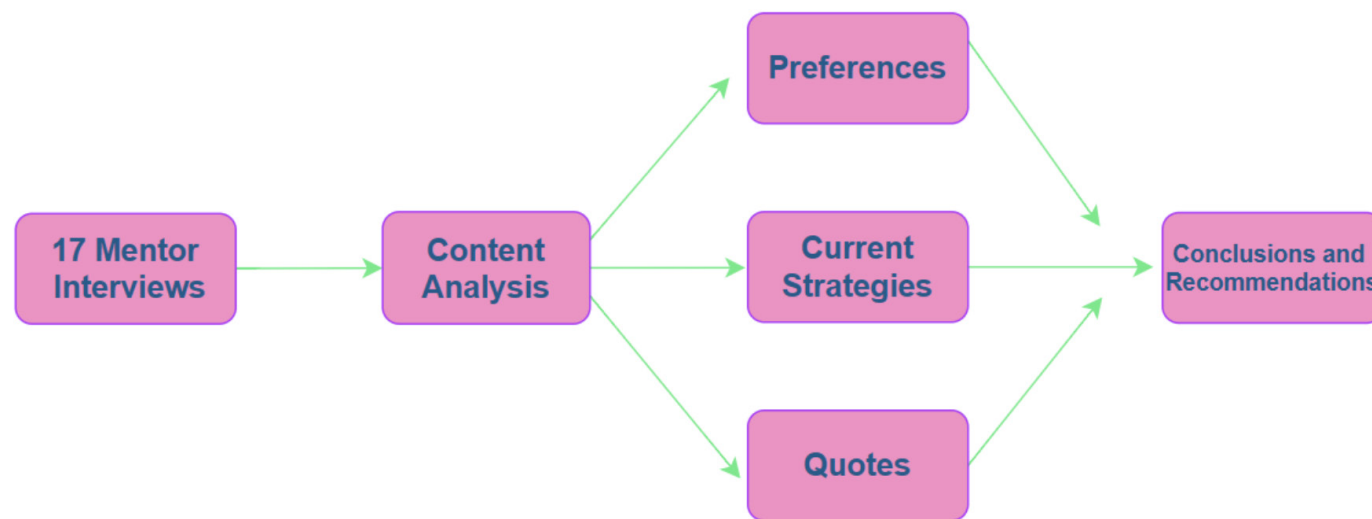


Figure 4: A flowchart showing how data analysis from the interviews informed our final recommendations to VVCR. A similar process was used for focus groups.

## Mentor Feedback and Results

This section discusses the results from the above methodology used to gather provider feedback and preferences. The collected information helped build recommendations for a hub with useful and worthwhile features from a provider's standpoint. To do so, we present the features and preferences that were most prevalent in our survey (Figure 5), interviews, and focus groups.

## Rating Systems

One of our primary findings is in the potential added value of a rating system. Three areas where a method to rate became clear. One research goal was identifying which of the methods would be valuable, and how best to implement them.

The first, and most important area of our research is a provider rating by the clients. Potential providers consistently identified past clients being able to describe their satisfaction with the service they received as a valuable method of advertising. Fifty-eight percent of survey respondents identified being rated by clients as one of the most desired potential features to them. Interviewees stated that word of mouth recommendations are their primary method for getting new clients. While this method suffers from difficulty in acquiring new clients rapidly or consistently, it comes with a level of trust from the new client that digital formats struggle to mimic. Our design must be as personable as possible, without being difficult to use. Our background research on similar platforms provides insight into rating system designs that best address this balance. Platforms like LinkedIn use specific skill endorsements and testimonials display the credentials of

raters to provide the most insightful view of a person.<sup>10</sup> Platforms like Airbnb<sup>11</sup>, Amazon<sup>12</sup>, and Craigslist<sup>13</sup> use a star system with optional textual reviews to provide insight primarily into the reliability and trustworthiness of a given company or product. Given that our platform advertises services offered by a freelance provider, a rating method must use the best parts of both approaches. Both the trust offered by more personal LinkedIn reviews and the assurance Airbnb's approach brings are crucial when promoting a relationship with a service provider.

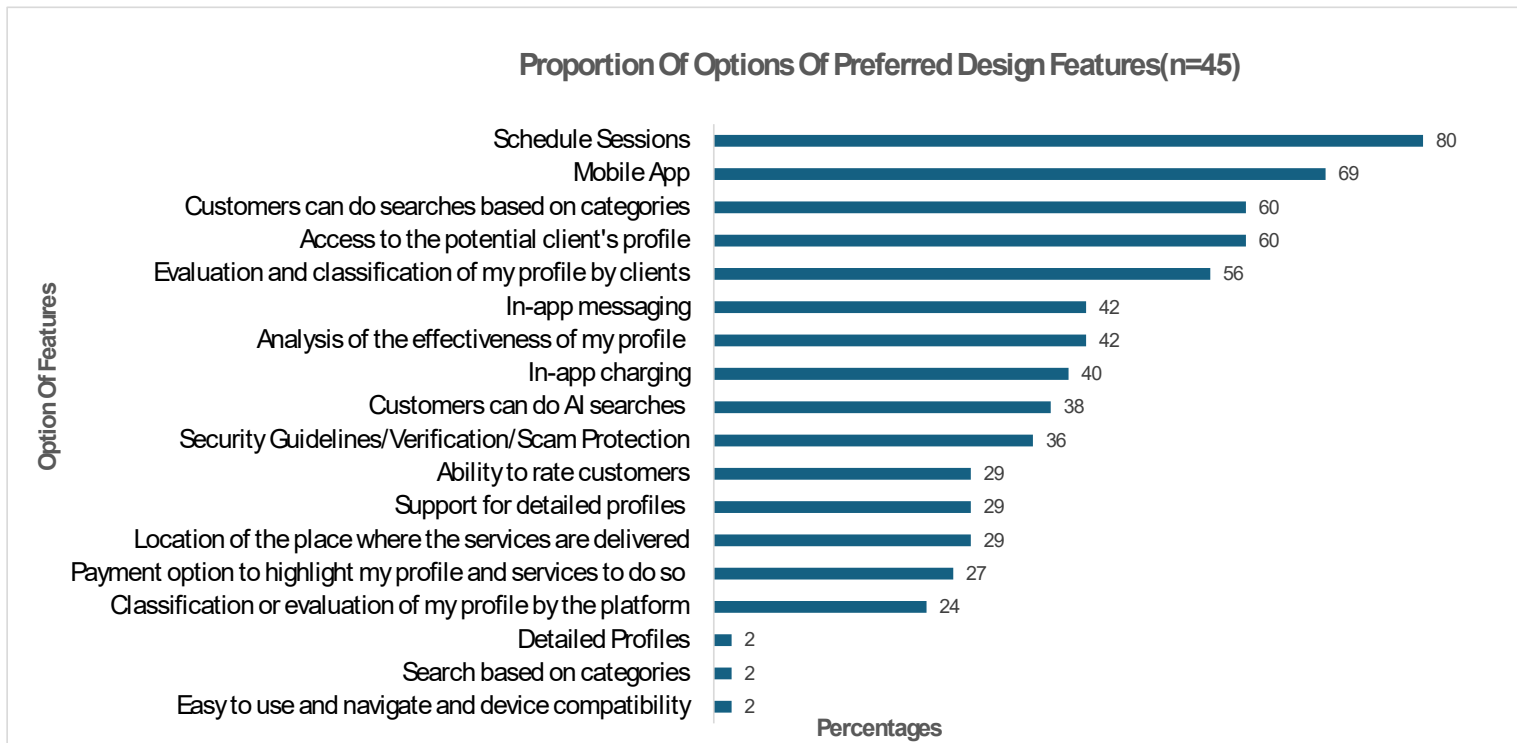


Figure 5: Survey results of the mentor's preferred design features.

The second area of possible implementation is a client rating by providers that have worked with them. While a client-focused rating system was less appealing to potential providers, many interviewees noted it could address significant issues they face, particularly the challenge of dedicating time to clients who are not genuinely committed to the process. If provided with information about the client before meeting with them, they could identify problematic clients before the fact. This difficulty justifies the need for a client profile, to give providers concrete data about a client. However, background information needed by the provider is more focused on the client's goals than how easy it is to work with them. The demand for a client profile backs up the need for a client rating system to provide information on client trustworthiness as well as interest. While only 31% of survey takers identified client ratings as useful, 59% expressed interest in access to a client profile. The implementation of a client rating system could be much simpler than a provider rating system. While a potential client benefits from in-depth testimonials on the quality of the service, the provider just needs to know whether the client is reliable. Text-based testimonials are of limited use to a provider when seeing a client. Client-sided recommendations could function similarly to Uber, where riders are rated, but only based on a star system, to provide baseline information on their demeanor. Although client-sided ratings are less valuable than provider-sided ones, their potential for straightforward implementation offers a favorable tradeoff between time invested and value gained.

The last area for a rating system to be implemented is by VVCR to providers. While not receiving the express interest of the others (27% of survey takers), it addresses many of the same raised difficulties the provider-sided rating hopes to, potentially bringing an added level of trust. Interviewees expressed the difficulty behind getting new clients to trust them without recommendation, causing digital platforms to be difficult to acquire clients from. The rating system must maximize the platform's ability to identify and promote trustworthy providers. Having a double layer, so strong performing providers are verified both by strong reviews, and a stamp of approval from VVCR has the potential to incur that extra trust. The VVCR name carries a powerful significance, because of the international nature of Vital Voices, so its verification can mean a lot to potential providers, shown in Figure 6.

The implementation of a platform given rating can function similarly to Airbnb, which puts icons on strong performing hosts when they reach certain statistics. One of the difficulties of implementing this system is deciding which desirable statistics earn platform promotion. One important factor is having taken a VVCR course, identifying which providers emphasize values of diversity and inclusion. More platform related statistics can be high customer satisfaction ratings, fast turnover or response, exceptional credentials in their field. These kinds of ratings can help clients immediately feel more secure in the reliability of a provider, increasing trust from the beginning. Platform provider ratings are a simple feature, and can directly address the mentor's main concerns, making them a valuable potential offering.

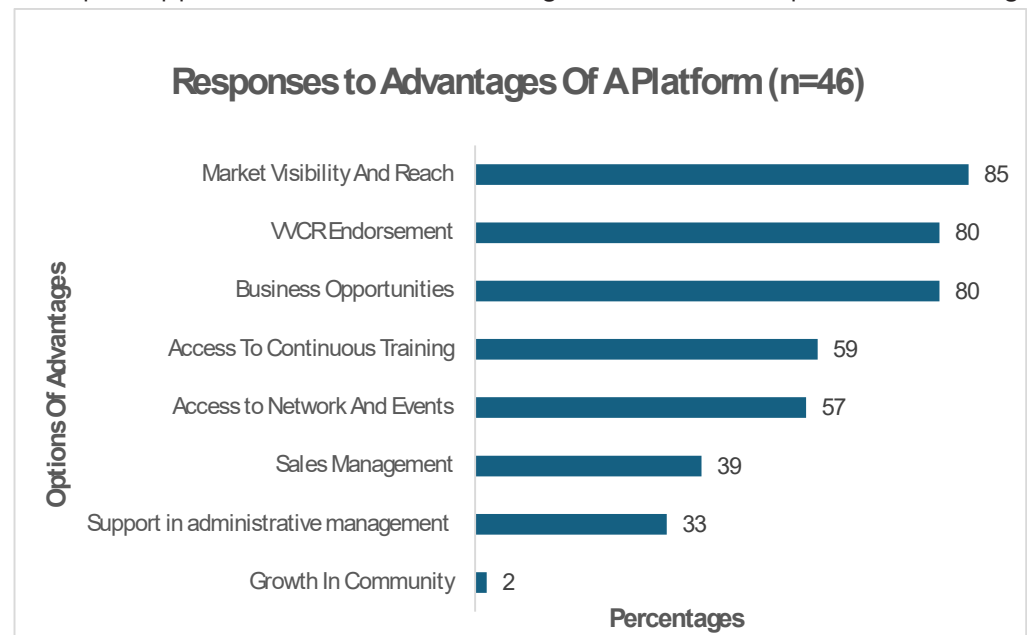


Figure 6: Survey results showing that 80% of respondents believe VVCR endorsement is a feature they would like to see in this platform.

## In App Scheduling

Our mentor survey identified the most desired feature as the ability for the platform to schedule sessions. Mentors use scheduling platforms to find a mutual date and time for a meeting with a client. These included: Google Calendar, Outlook, and Calend.ly. This software allows mentors to fill in time slots with their activities during specific times. Also, according to some interviewees, some mentors had a secretary to handle scheduling while other mentors sent the clients their schedule on Outlook or Calend.ly. Scheduling software makes it easy for users to plan their upcoming days.

Another benefit of in-app scheduling is the ability to fill in for gaps in the scheduling of clients. One interviewee explained that a mentor could have a packed schedule for a month and then have clients on a waitlist. A feature that can be obtained from this finding is the automation of a fill-in from the waitlist. For example, if one client cancels then a client from the waitlist will fill in. The only downside is that the client would have to go into the office or conduct the session on short notice. However, this will save mentors money and time because the time slot would not go unused. This could be an advantage for clients because they get the session that they want at an earlier time than scheduled (waitlist is usually a month for this mentor). These mentors are an important and beneficial part of different clients' lives. So, if waiting clients can go in once another client cancels, then they can start the process of changing their life at an earlier time than staying on the waitlist for a month.

An interviewee notably stated that she only used Calend.ly to book her sessions with clients and that she did not like to manually enter her schedule again in different platforms. One way to solve this is through APIs or app stores<sup>14</sup>. To integrate schedules from other platforms, a developer needs to have knowledge of all required integration points. However, third-party APIs like Read<sup>15</sup>, shown in Figure 7, lead to a higher development bill because of the coding needed. Pictured below is an example of how one software syncs with a scheduling platform so that users don't have to duplicate their calendars every time a change is made. They can just use one calendar scheduling platform then sync it to avoid wasting time and the need for manual entries.

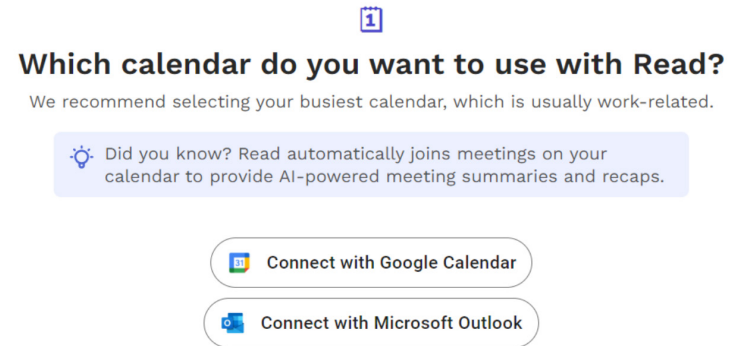


Figure 7: Calendar integration using Read uses Google Calendar or Microsoft Outlook to sync already scheduled calendar.

## Search Functionality

One design element that has significant impact on the workings of a platform like this is the operation of the search function. To connect clients and mentors, one party needs their requirements and capabilities posted, while the other party initiates a search and sends a match request. There are three ways that this platform could manage this: 1) the client searches for a mentor that meets their needs; 2) the mentor searches for a client that is looking for the services they offer or 3) it's partially centralized, with one party initiating a match and the other being able to view the matcher's profile; and accept or reject it. Based on conventional design, the party initiating the search should be the one with the more complicated needs.<sup>16</sup> This background research enables us to rule out a mentor-initiated match. Centralized matchmaking systems are used in platforms like Tinder, where both parties have complicated needs and need to choose the other. One of the main questions of our data gathering process then is: are mentor's preferences in terms of the clients they accept complicated enough to warrant centralized matching? Utilizing a centralized method potentially provides a setback to the platform, slowing down mentor-client connection enough if poorly implemented to demotivate clients to use the service.<sup>16</sup>



In the case of purely client-initiated matchmaking, a client will search for the provider type they want, find one who satisfies their needs, and initiate a match. The client will then immediately be put in contact with the provider, who will schedule a meeting if their goals are aligned. In the case of providers who will accept any client, this method works best, allowing for the most streamlined process. If providers are regularly turning away clients with unrealistic or mismatched goals, then rapid matching comes at the cost of wasting provider time, removing value. Interview data has shown that many of the potential providers waste significant time on clients they can't work with, displaying the need for a centralized search method. However, research has also revealed that client needs are much harder to describe, making provider-initiated searching less valuable. This displays the need for a modified centralized search function, where clients initiate the match, and information on their goals is pushed to the providers so they may turn away mismatched clients without requiring extensive communication.

#### Open-Ended Search

What are you looking for?

search results shown here

Keyword Filter

- Service Format
  - Digital Course
  - Session
  - Long-Term Teaching
- Provider Type
  - Financial Advisor
  - Ontological Coach
  - Personal Branding
  - Nutrition Specialist
- Specialization
  - Emotional Intelligence
  - Portfolio Management
  - Leadership Training
- VVCR Endorsed

Figure 8: Search Functionality Example

The technical workings of a search function are as important to the hub's operation as which party is doing the searching. Common search functionality operations include keyword based searches or an open-ended search bar. Shown in Figure 5, sixty percent of survey responses opted for the hub to include categorical, keyword driven search options. When we delved into this further in our mentor interviews, many stated that a categorical search feature would be most useful for cutting time and finding exactly what kind of service is needed. Categorical search functions based on keywords instead of in-depth searches would logically prove more useful.<sup>17</sup> Searching for keywords would allow easier implementation from a coding standpoint and allow users who are not sure what they want to explore different categories.

However, focus group attendees emphasized their strong preference for an open-ended bar-based search feature, referencing a common issue with clients who were unsure about their exact needs. Additionally, the variety of services and specializations available are diverse enough, they felt a keyword search would potentially leave out certain types of providers. They felt that a textually flexible search, pulling up profiles that include the words searched for would allow clients who were struggling to describe their issues to better find relevant services. This kind of search addresses common thought processes within the client base, but is much more difficult technically to implement. Allowing clients flexibility in their search will cause many situations where a client uses non-standardized language, and is unable to find any results. A combination of the two methods then addresses the failings of each. An open-ended search bar allows for the flexibility clients likely desire, while an included keyword-based search option guarantees results in the case a client's language is too specialized to generate results. This feature requires further research with the client base to identify whether an open-ended search is valuable enough to warrant the development time and difficulty it will incur. An example of the possible implementation of a combined method is shown in Figure 8.

## Client Profile

A client profile would be especially useful for mentors who are selective with their clientele. Many mentors who worked part time, or offered services as a second job emphasized the importance of finding clients worth their time. Platforms like LinkedIn and Uber have client or user testimonials. On Uber, a driver can decline a ride if the rider has warnings on their profile, similarly job recruiters on LinkedIn can make hiring decisions based on the number of endorsements, skills, and relevant experience someone has on their profile. A detailed client profile would enable the mentor to get to know the client a bit more before they meet. Many mentors mentioned in interviews that they would like to see a client's goal statement before their first meeting. A feature where clients can input their expectations would also immensely help the mentors. Mentors who turn away clients stated that they often do so because prospective clients have unrealistic expectations from their service.

Interviews with financial coaches, wellness advisors, and providers of similar services revealed that client profiles could save time. Wellness is something that cannot be quantified, nor predicted, so progress is not always linear. Similarly with finance, the instability of the market can lead to setbacks that are beyond control. Interviewees mentioned that a client's goal, income, and budget could be shown in their profile, allowing for a personalized matchmaking process and a relationship that is more likely to be worthwhile for both parties.

While interview and survey data have affirmed the need for a client profile, implementation of it has serious ramifications on the functionality of the matching function. The danger of a client profile is in its ability to slow down the process, putting a time barrier in between the match being initiated and the relationship advancing. Other issues with a client profile raised by interviewees are the nature and variability of needed data. Each interviewee identified different information that they would like from potential clients before accepting a match. Also, many of the providers want sensitive information, like income and budget. Many clients would be reluctant to post this information publicly, with a standardized profile likely having limited information irrelevant to many providers. Our interviews have proven the need for a client profile, or some method of receiving information about the client before matching, while simultaneously raising the serious issues with a standardized client profile. In order to solve these issues, we designed a method to custom tailor the client profile without incurring major slowdowns. The usage of a questionnaire is one option to replace the profile, addressing its limitations while maintaining its needed value.

A small percentage of our interviewees expressed discontent with the existence of a client profile or questionnaire. They felt that information was better with a brief filtering interview, where the intention of the person could be ascertained. While enough of a popu-

lation of interviewees wanted pre-match information to justify its existence, the opposing population introduced the value of this system being optional. This is another reason to not use a client profile, given its creation at the adoption of the platform, there is no possibility for it to be optional based on provider preference. The slowdown the profile introduces is unavoidable, even to providers who feel a filter interview better fits with their process.

## In-App Payment

Integrated payment is a valuable feature to potential providers based on our gathered data. Forty-one percent of survey takers identified it as such. Multiple interviewees in the wellness fields have mentioned that they are paid after providing services, which can result in scams, or last-minute cancellations without communication. Payment through the platform would increase security and reliability for mentors and provide ease-of-use to clients. While the feature theoretically offers value, its practical implementation poses significant challenges, particularly regarding the secure handling of sensitive payment information, which demands a robust technical team. VVCR has a barebones IT department, which makes implementing a feature with this level of risk for users difficult. EAPLatina, a multi-billion-dollar company, only recently acquired secure payment and is the only competitor with this feature in the region. Third-party services, such as Stripe, could be integrated with secure payment, however, many of these services, including Stripe, are non-functional in the region, leading to more

difficulties bringing this feature to the platform. While payment is a needed feature, finding a viable method of implementing it while addressing security concerns will be difficult. This raises the question of whether it is a valuable feature for VVCR investment, which depends on the knowledge of the website development team, as well as the possibility of added compatibility from existing payment services in the near future.

## **Navigating the Cold Start Challenge for VVCR's Digital Hub**

The introduction of VVCR's digital hub, designed to facilitate women's empowerment and leadership development, faces the "cold start" problem, a significant hurdle for new matchmaking platforms. This issue requires both mentors and clients to engage with the platform promptly for it to function effectively. Without balanced engagement, the platform could fail to launch successfully, as one group waits on the other to join, risking the platform's early stagnation.

In VVCR's context, bureaucratic complexities and the influence of large international firms create additional challenges, especially for freelance mentors navigating paperwork and operational barriers. VVCR's strategic adoption of a first-party model, where it hires freelancers on behalf of clients, aims to streamline this process. However, this approach increases VVCR's liability and underscores the need for a stringent mentor vetting process to ensure service quality and maintain trust.

To mitigate the cold start problem, VVCR must balance rapid platform growth with the integrity of mentorship quality. An open third-party system could potentially quicken the platform's expansion but necessitates a strategy that guarantees mentor credibility and platform reliability. Ensuring a sufficient pool of qualified mentors from the outset is vital for the platform's momentum.

Vital to the platform's success is finding the right equilibrium between swift expansion and maintaining high mentorship standards. By providing clear benefits to mentors, VVCR can justify a commission model that supports further development and growth. Insights from analogous platforms and detailed analysis of mentor engagement will guide VVCR's strategy, ensuring the platform overcomes initial hurdles to thrive and enable impactful mentor-client connections.

Ultimately, transitioning to a digital hub requires a nuanced strategy that addresses the cold start problem through a focus on scalability, reliability, and quality. Leveraging its unique position and lessons from successful platforms, VVCR is poised to create an influential online ecosystem for women's empowerment and leadership development. This multifaceted strategy is crucial for launching a platform that effectively connects mentors and clients, overcoming initial engagement challenges to achieve significant impact.

## **Summary of Feature Requirements**

Our research aimed at enhancing a provider-focused hub identified key insights and features to improve utility and user experience, notably through the implementation of a nuanced rating system that boosts trust and credibility. This system, which mirrors the effectiveness of word-of-mouth recommendations, could be expanded to allow mutual ratings between providers and clients, alongside platform-to-provider endorsements, to further build trust. The need for integrated scheduling, advanced search functions, and detailed client profiles underscores the push towards a convenient platform, facilitating better matchmaking. Additionally, exploring an in-app payment system, despite its challenges, reflects a commitment to secure transactions, emphasizing the importance of a solid technical infrastructure. These findings ensure the platform harnesses the power of user-centered design, addressing specific needs to foster a more connected, efficient, and trustworthy digital environment for providers and clients.<sup>18</sup>

## Proposed Hub Design

The combination of gathered mentor base data and analysis and similar platform research provided insight into the most beneficial, efficient layout for this hub. Figure 9 displays this layout. This operational flow allows for the best implementation of the necessary features, and the most straightforward experience for both clients and providers. It is based on similar platforms, different most crucially in its modified centralized matching system. The system allows clients easy insight into providers that meet their specifications, while maintaining provider input in the clients they take while maximizing their time. Also, the optional pursuit of a client questionnaire and VVCR certification allow the provider significant flexibility in the way they use the platform, without causing an increase in developmental difficulty. The provider can choose to use a filter interview rather than a questionnaire if they'd rather learn about their client face to face. They can pursue VVCR endorsement if they'd like a direct relationship with VVCR, or not if they'd rather use the platform as a simple supplement to their usual client acquisition process.

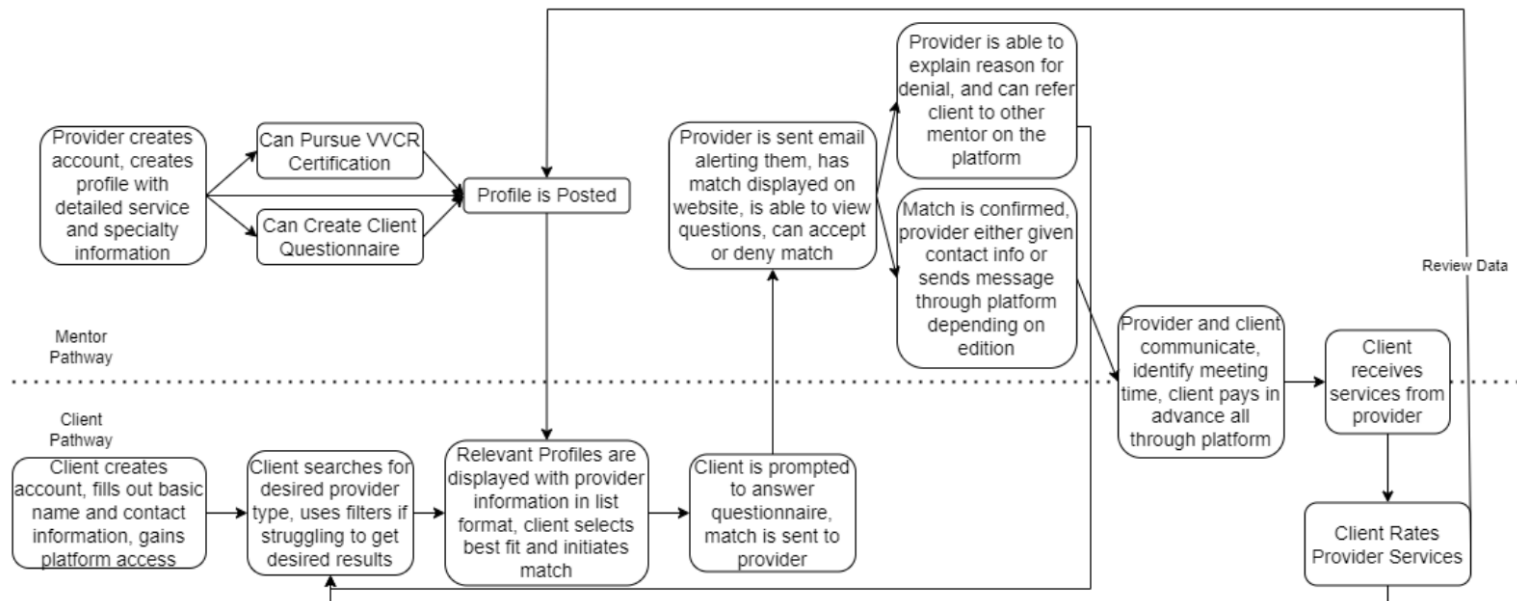


Figure 9: Website Operations Flow Chart

require minimal time so that reluctant providers are not turned away from the platform by setup length. The remaining optional questions are open-ended and allow more committed providers an area to further develop their profile with video and free write options. The providers are encouraged to choose from a preset list of options for their general role, and then further define their services with the expertise/specialization section. If the preset list of roles doesn't contain the services a provider offers, they will have the option to add to the list. This ensures the search functionality will pull up relevant results, standardizing language so client terminology does not cause providers to go unseen. Figure 11 shows how the profile design comes into search functionality. When the client searches, relevant provider profile postings will be displayed, with general role, specialization, star rating and VVCR endorsement status in the posting, opening into the full profile when a client clicks on one. Those four fields provide the client with enough information to knowledgeably filter through providers. Through the open-ended bar, clients can try to identify the provider they are looking for with specific language. In the case that provides unsatisfactory results, the filter bar offers standardized language to ensure clients can meet their needs.

The provider profile's layout is also carefully designed to address different user preferences and maximize the platform's efficiency. Figure 10 displays the provider profile layout, with the starred questions as mandatory, and the client questionnaire and VVCR certification hyperlinked at the bottom to allow for easy navigation. The mandatory questions were chosen to ensure providers who were reluctant to spend time setting up a profile had to input enough information to be informative to clients. There are few mandatory questions, and they





Figure 11: Client search example layout, with VVCR Certification prominently displayed, and prioritized over non-certified providers.

## My Profile

John Doe - Ontological Coach

- + Add Expertise\*
- + Add Experience\*
- + Add Service Preference Format\*
- + Add Language Capabilities\*
- + Add Standout Projects
- + Add Video Bio
- + Add Additional Information



Continue Adding to Increase Percentage

**+ Register for VVCR Certification**

- + Add Client Questionnaire

Figure 10: Provider profile example layout, featuring a VVCR Certification Hyperlink as an optional element.

In implementing this platform, VVCR should prioritize rapid launch to measure interest and fund further development. This means first implementing features which are easy to configure, and are crucial to the operation of this platform. These initial features are provider profiles with ratings, client-initiated match-making, and a client questionnaire, with detailed plans in Figures 10-14. Post-launch, the focus should shift to enhancing functionality with features that, while valuable, are not critical for initial operation and more complex to implement, such as in-app messaging, calendar-integrated scheduling, and in-app payments with automatic commission handling. These additions will also pave the way for developing partner benefits, including managing paperwork and tax information for transactions. As the platform matures and proves successful, VVCR could then invest in high-demand, complex features like a mobile app and dual-sided matching, which allows providers to also initiate matches. This phase should also include updates to improve existing features based on operational data, enhancing the overall platform experience. Figure 12 highlights the implementation steps and the features they include.

We recommend using a tailored client questionnaire for pre-meeting information gathering, designed by providers upon profile creation. When clients choose a provider, they complete this questionnaire, triggering a match notification and email reminder to the provider, who can then accept or reject the client based on the responses. Rejections include a text response directing the client to a more suitable provider, leveraging the mentor network to enhance platform connectivity and growth. This approach, preferred for its ability to capture specific and sensitive information varying by provider type (e.g., therapists need different information than financial advisors), prioritizes privacy and customization over general profiles. The recommendation feature upon rejection further supports network development, with the simple survey implementation offering a significant value for the time invested. However, it introduces a potential slowdown in the matching process, possibly deterring clients who are unwilling to complete surveys. Providers must balance survey length and sensitivity to avoid limiting matches. VVCR may need to guide questionnaire design to ensure they are both useful and concise at launch. Figure 13 displays the layout and flexibility of this questionnaire system.

VVCR should utilize a rating system with a 5 star function, a text based response, and a keyword selection. This layout is shown in Figure 14. A common rating system design, with a star system and a long form text question, suffers drawbacks in this use-case. Star systems provide minimal information other than satisfaction, and textual responses go frequently unanswered. Keyword responses reach a happy medium, providing crucial information to potential clients while being quick enough to answer to prevent turning away reviewers. Textual responses and stars complement this, providing pure satisfaction information, and offering more comprehensive reviews when clients are willing. Implementing a rating system is easy and high value, requiring minimal elements. The keyword selection will be the hardest to implement, as the platform should suggest possible keywords, requiring the platform to recognize the role of the provider and generate a list of relevant words. The keywords should allow the user to type in words as well as selecting from a pre-determined list, and then should add user words to the list in the future, allowing the list to improve itself over time. We determined a rating feature for the client provided minimal value, so the platform only needs a system to rate providers.

Figure 14: Recommended provider rating system.

Figure 13: Two example questionnaire layouts, with different provider roles and transaction types.

## Project Recap

The research done in this project paves the way for a transformative online service platform that could revolutionize leadership dynamics and the market in Costa Rica. By embedding VVCR's values into this platform, it stands to increase the demand for their practical skills programs and amplify their regional influence. The prospect of obtaining a VV certification already presents a compelling incentive for professionals, given its value in promoting sustainable and inclusive business practices. Since 2012, this incentive has attracted many providers to VVCR, but more innovative strategies are needed to broaden their impact further.

To address the challenges inherent in launching a new platform, the team devised recommendations to ensure successful rollout and sustainable growth. This involves a detailed competitor analysis to understand the market landscape, including a deep dive into direct competitors like EAP Latina and an evaluation of contemporary platform features across different service hubs. The team assessed mentor preferences to create a user-centric, secure, and professionally appealing environment that encourages engagement and builds trust among its users. By adopting best practices from marketplace platforms and integrating them with the unique value proposition of the VVCR brand, the organization is poised to create a pioneering platform that not only meets the immediate needs of mentors and clients but also sets new standards for quality and efficiency in the mentorship domain.

## Launch Recommendations

VVCR should utilize referral discounts in the advertisement of this platform. Bringing on new users is the most critical component in the successful launch of this platform. In order to facilitate this, VVCR should provide a cut to their charged commission when a provider gets another user to sign up for the platform. When a client does, the platform should provide a discount on the client's next services, out of VVCR's percentage commission.

To capitalize on the advantages offered by a more hands-on 3rd party system, and a speed-oriented 1st party system, VVCR should configure the platform to utilize both methods. Rather than requiring a thorough vetting process for platform adoption, providers should have almost no requirements to get on the platform. The vetting process should instead provide VVCR endorsement and partner benefits. Our data has shown that VVCR endorsement is enough of an advantage that providers will seek it for the trust it brings clients. By having no onboarding requirement, the platform minimizes the risk of slowing platform usage and weakening launch. By allowing providers to seek VVCR partnership, the platform increases the value it provides and encourages adoption. Using both methods decreases risk, increases value, and ensures VVCR is only liable for providers it can account for. Figure 10 shows how VVCR partnership (endorsement) is advertised to the providers and its optional nature. Figure 11 displays the way VVCR partnership is advertised to the clients.

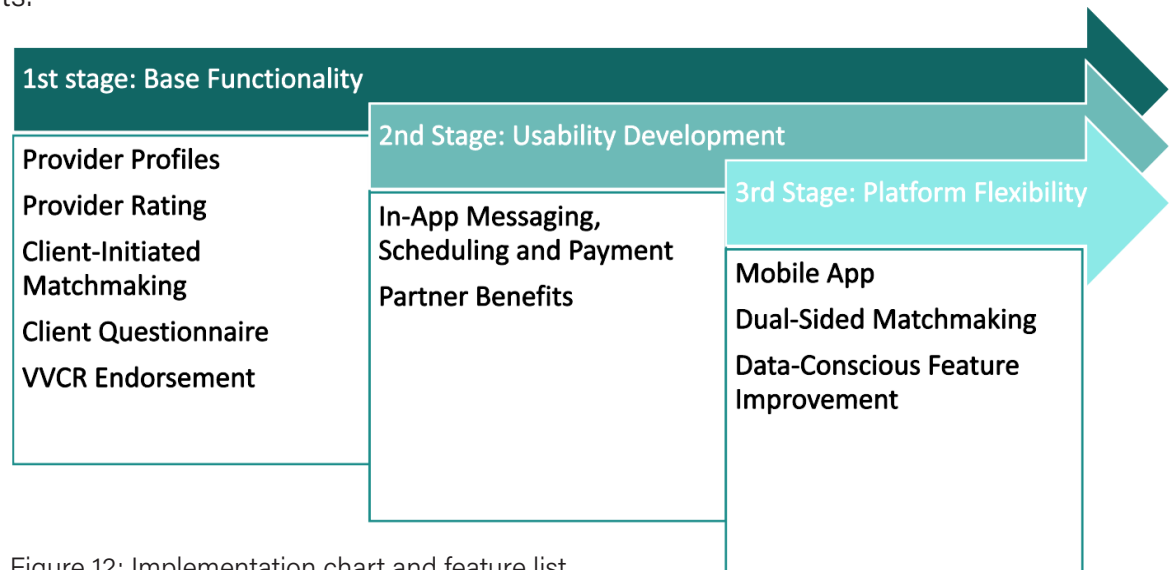


Figure 12: Implementation chart and feature list.

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