

An Analysis of the Market Viability for an AI-Powered Youth Soccer Coaching and Development Platform

Section 1: Executive Summary & Strategic Recommendation

1.1 The Core Opportunity: A Synthesis of Market Need and Product Vision

The United States youth soccer market represents a substantial, passionate, and increasingly tech-savvy ecosystem. It is an environment characterized by high levels of engagement from players, coaches, parents, and club administrators. However, it is currently served by a highly fragmented landscape of technology solutions. While numerous companies offer powerful tools for specific tasks such as video analysis, team management, or individual skill development, a significant and unaddressed market need persists: the absence of a single, integrated platform that unifies club methodology, coach planning, player development, and parent communication.

The vision for an AI-powered Software-as-a-Service (SaaS) platform that automates curriculum deployment and session planning directly addresses this systemic inefficiency. The core opportunity lies in bridging the critical gap between a club's high-level philosophy, often documented in static files and communicated via email, and the on-field reality of daily training sessions [User Query]. This proposed platform is not merely another tool to add to a coach's toolkit; it is envisioned as the central operating system for a youth soccer club. It aims to be the single source of truth that aligns the strategic oversight of the Director of Coaching (DOC), the tactical execution of the coach, the tangible development of the player, and the informed engagement of the parent. By transforming a static curriculum into a dynamic, data-driven, and automated workflow, the platform can solve the most pressing functional, emotional, and social "jobs" for each of these key stakeholders.¹

1.2 Key Findings: A Top-Line Summary of Market, Competitive, and Customer Insights

A deep analysis of the market landscape, competitive pressures, and customer needs reveals a clear and compelling case for the proposed platform.

- **Market Dynamics:** The potential user base is massive, with US Youth Soccer alone registering nearly 3 million players and over 900,000 coaches and administrators in the years leading up to 2020.² While the market is robust, it is not without its challenges. Concerns regarding the high cost of the "pay-to-play" model and the significant time commitment required are prevalent, leading to player dropout.³ This environment creates a distinct opportunity for a solution that can demonstrably increase the value, effectiveness, and engagement delivered for the significant financial and time investment made by families.
- **Competitive Landscape:** The current market is defined by a collection of strong but fundamentally siloed competitors. Video analysis giants like Hudl and Veo have cornered the market on game and performance analysis.⁵ Team management applications, most notably MOJO, have successfully captured the volunteer coach segment by offering simple, free, and time-saving logistical tools.⁷ At-home player development apps like Techne Futbol and wearable technology from Playermaker (now CITYPLAY) excel at engaging players outside of team practice.⁸ However, no single competitor provides an integrated solution that effectively serves the DOC's primary responsibility: the systemic implementation, monitoring, and refinement of a club-wide coaching curriculum.¹ This "integration gap" is the platform's primary strategic opening.
- **Customer Needs:** All four key personas—DOC, coach, player, and parent—are grappling with the consequences of this fragmented technology landscape. The DOC possesses a club philosophy but lacks a system to effectively deploy, monitor, and measure its impact. The coach, whether a professional or a volunteer, is time-poor and lacks the tools for efficient, curriculum-aligned planning [User Query]. The modern player requires personalized, engaging, and digitally native guidance to supplement team training. The parent, who is the primary economic stakeholder, desires clarity, consistent communication, and confidence in their child's development process.¹ These are not four distinct problems but rather four interconnected symptoms of the same systemic inefficiency, which an integrated platform is uniquely positioned to solve.

1.3 The Verdict: A "Go / No-Go" Recommendation on Market Viability

Based on an exhaustive review of the market data, competitive environment, and customer needs, the strategic recommendation is a confident **"Go"** for the development and launch of the proposed AI-powered youth soccer platform.

This recommendation is predicated on the platform's unique ability to address a clear, high-value, and unmet need in a large and well-funded market. The fragmentation of the competitive landscape is not a deterrent but rather the central justification for market entry. The platform's vision for an integrated "operating system" is a powerful and defensible differentiator that existing point solutions will find difficult to replicate without a fundamental re-architecting of their products and business models. The market is primed for a solution that delivers not just more features, but true workflow automation and strategic alignment.

1.4 The Path Forward: High-Level Strategic Imperatives for Success

To translate this market opportunity into a successful business, the following strategic imperatives must guide product development and go-to-market efforts:

1. **Solve the Director of Coaching's Problem First and Foremost:** The DOC is the key strategic buyer for a club-wide implementation. The platform's anchor features must be the AI-powered Curriculum and Planning Engine and the DOC Analytics Dashboard. These tools address the DOC's most critical "Jobs-to-be-Done": strategic oversight, quality control, and program analysis.¹ Winning the DOC is the key to securing high-value, club-wide enterprise contracts.
2. **Adopt a Flexible, Hybrid Go-to-Market Strategy:** The market supports multiple business models. Success will require a tiered approach that accommodates different entry points. This involves blending the bottom-up, freemium user acquisition model perfected by MOJO ⁷ with the top-down, B2B enterprise sales model used effectively by Techne Futbol.¹⁰ This allows the platform to capture individual coaches and teams while creating a clear upsell path to full club-wide adoption.

3. **Compete on Integration and Workflow Automation, Not Just Features:** The platform's unique value proposition is not in having a marginally better video analyzer than Hudl or a slightly larger drill library than The Coaching Manual. Its defensible moat is the intelligent, AI-driven workflow that seamlessly integrates video analysis, club methodology, player data, and automated planning. The core mission is to eliminate the manual "stitching together" of disparate tools that currently burdens coaches and DOCs, thereby saving time, reducing friction, and ensuring philosophical alignment across the entire organization.

Section 2: The Youth Soccer Technology Market Landscape

2.1 Market Scale and Structure: Quantifying the Addressable Opportunity

A thorough understanding of the market's size and composition is fundamental to assessing the viability of the proposed SaaS platform. The analysis progresses from the broadest possible market definition to a focused, realistic target for a new market entrant.

2.1.1 Total Addressable Market (TAM): The Universe of U.S. Youth Soccer

The Total Addressable Market (TAM) represents the total potential revenue opportunity if every possible customer were to adopt the product. The most reliable baseline for this figure comes from US Youth Soccer, the largest youth sports organization in the country. According to its 2019-2020 annual report, US Youth Soccer registered nearly **3 million players** annually between the ages of 5 and 19. In addition, the organization registered over **900,000 administrators, coaches, and volunteers** across its 55 member State Associations.²

While these figures pre-date the COVID-19 pandemic and subsequent shifts in youth sports participation, they establish a credible and substantial foundation for the

overall market size. This massive user base of players and coaches represents the outer boundary of the potential market for a youth soccer technology platform. Even minor shifts in participation, such as a reported 8% annual decline in some athlete cohorts, do not fundamentally alter the conclusion that the TAM is exceptionally large.³

2.1.2 Serviceable Addressable Market (SAM): Identifying Clubs with the Means and Motivation to Adopt

The Serviceable Addressable Market (SAM) is a more realistic subset of the TAM, representing the segment of the market that is a viable target for the specific product offering. Not all of the 3 million players and 900,000 coaches are part of the SAM for an advanced curriculum and coaching enablement platform. The SAM consists of clubs and teams that possess a certain level of organizational sophistication, financial capacity, and strategic intent focused on structured player development.

This segment can be identified by observing the customer bases of existing premium technology providers. Clubs that invest in team-wide subscriptions to at-home training apps like Techne Futbol (which can cost \$1,500 per year for a single team)¹⁰, purchase or rent AI-powered cameras like Veo (rentals starting at \$250 plus subscription fees)⁶, or subscribe to advanced video analysis packages from Hudl¹¹ constitute the core of the SAM. These are typically the "travel," "club," or "academy" level organizations that employ paid Directors of Coaching and have a documented, albeit poorly implemented, curriculum.¹ They are distinct from purely recreational or parent-run programs where the primary focus is participation rather than structured, long-term development.⁴ This segment is actively seeking tools to gain a competitive edge and professionalize their operations, making them the ideal target customers.

2.1.3 Serviceable Obtainable Market (SOM): A Realistic 3-5 Year Target

The Serviceable Obtainable Market (SOM) is the portion of the SAM that a new entrant can realistically capture in its initial years of operation, typically over a 3-to-5-year period. This calculation must account for competitive pressures, brand

recognition, and sales and marketing capabilities.

Given the highly fragmented nature of the current competitive landscape and the platform's unique value proposition centered on the underserved DOC persona, capturing a meaningful share of the SAM is an achievable goal. A target of securing 5% to 10% of the sophisticated club market within the first 3-5 years represents an aggressive but realistic objective. This market share would be achieved by directly targeting the clubs that already demonstrate a willingness to pay for technology but are frustrated by the lack of an integrated solution. A financial model based on a tiered, per-player pricing structure would project significant recurring revenue from this obtainable market, validating the business case for the platform's development.

2.2 Prevailing Winds: Key Trends Shaping Modern Player Development

The youth sports landscape is not static. It is being actively shaped by powerful technological and philosophical trends. The proposed platform is not only aligned with these trends but is positioned to be a leading enabler of them.

2.2.1 The Unstoppable Rise of Video: From Professional Analysis to Sideline Coaching

Video is no longer a luxury item for elite programs; it has become a standard and expected component of competitive youth sports.¹² The widespread adoption of platforms like Hudl and Veo has democratized access to game film, shifting expectations for coaches, players, and parents. Hudl has successfully transitioned from a high school football tool to a multi-sport platform, offering sophisticated software-based analysis, including AI-powered insights through its Assist+ feature.⁵ Simultaneously, Veo has revolutionized the capture process with its AI-powered camera that automatically records and follows the play, removing the need for a dedicated cameraperson.⁶

The critical implication of this trend is that any modern development platform must be video-centric. However, the opportunity is not merely to replicate existing analysis tools. The next evolution, which this platform is poised to lead, is to transform video

from a *reactive* analysis tool (analyzing what happened in the last game) into a *proactive* planning tool. The platform's ability to allow a coach to upload game footage and have the AI automatically tag moments—both positive and negative—that are directly relevant to the upcoming week's training topic is a revolutionary step. This connects past performance to future preparation in a seamless, automated workflow, a capability that current market leaders do not offer.

2.2.2 The AI Revolution in Coaching: Personalization, Efficiency, and Predictive Insights

Artificial intelligence is rapidly moving from a theoretical concept to a practical tool in sports coaching.¹³ Competitors are already deploying AI in narrow applications: Veo uses AI to track the ball, and Hudl uses AI to automate the tagging of key game events and generate performance summaries.⁶ Academic and industry research highlights the immense potential of AI to deliver personalized training programs, provide real-time feedback, enhance performance, and even contribute to injury prevention.¹³ Athletes themselves recognize the benefits of AI in improving training efficiency and providing customized workouts.¹³

The proposed platform's core differentiator—the AI Planning Engine—is perfectly positioned at the vanguard of this trend. It moves beyond the simple *analysis* of data to the more complex and valuable task of *synthesis and creation*. The engine is designed to ingest multiple data streams—the club's static curriculum, the specific team's age and ability level, the performance data from the last game, and a global library of best-practice drills—and synthesize them into a coherent, customized, and actionable training plan. This represents a significant technological and value leap over competitors, shifting the coach's role from a manual planner to a manager and facilitator of an AI-assisted development process.

2.2.3 The Engagement Economy: Gamification and At-Home Training Apps

The understanding that player development extends beyond the confines of scheduled team practices is now mainstream. This has fueled the success of a new category of technology focused on individual, at-home training. Apps like Techne

Futbol, created by former professional player Yael Averbuch, have proven that there is a significant market for tools that guide and motivate players to train on their own.⁸ Techne's use of leaderboards, challenges, and a gamified "sock level" progression system are brilliant examples of how to maintain long-term player engagement.⁸ Similarly, the MOJO app incorporates gamified elements to make practice fun and engaging for younger players.⁷

This trend validates the player engagement loop envisioned for the platform.¹ Features such as personalized "homework" assignments, progress tracking against Individual Development Plans (IDPs), and interactive tactical quizzes are not just nice-to-have additions; they are essential components for capturing the modern player's attention. By making learning interactive and measurable, the platform can increase player motivation, accelerate skill acquisition, and provide tangible evidence of progress, thereby satisfying the needs of the player, the coach, and the "Co-Developer" parent persona who wants to support their child's journey.¹

2.2.4 The "Whole Child" Mandate: Insights from the Aspen Institute's Project Play

A significant philosophical shift is underway in youth sports, driven by influential organizations like the Aspen Institute and its Project Play initiative. There is a growing movement away from a purely "win-at-all-costs" mentality toward a more holistic, "whole child" approach that prioritizes long-term development, physical safety, mental well-being, and creating a positive, inclusive environment.¹⁶ Reports from communities like Tacoma-Pierce County show that while only 19% of youth meet recommended activity levels, those who are more active report better mental and emotional health, reinforcing the deep connection between sports and overall well-being.¹⁸

This macro trend provides a powerful tailwind for the proposed platform's mission. By ensuring that every coach, regardless of experience, is delivering age-appropriate, curriculum-aligned, and engaging training sessions, the platform directly contributes to a higher quality, more consistent development environment across the entire club. By providing tools that educate parents and streamline communication, it reduces friction and fosters a more positive and supportive club culture. This alignment with the "whole child" mandate addresses a key emotional "job" for parents: the need to feel confident that their child is in a safe, positive, and well-run program.¹ It positions the platform not just as a performance tool, but as a guardian of club culture and a

facilitator of positive youth development.

2.3 Barriers and Accelerants to Technology Adoption in Youth Clubs

Despite the clear trends toward technology, clubs face both significant hurdles and powerful motivators when considering new investments.

2.3.1 Barriers to Adoption

- **Cost and Financial Pressure:** The "pay-to-play" model of youth soccer is a source of significant financial strain and frustration for many families.³ Club fees, tournament costs, and travel expenses already represent a major investment. Adding another high-cost technology subscription can be a difficult proposition. The pricing of elite tools, whether it's the hardware cost of a camera system or expensive per-player software licenses, can be a major barrier, especially for smaller clubs or those serving less affluent communities.⁴ The platform must demonstrate a clear and compelling return on investment to overcome this hurdle.
- **Time, Complexity, and Coach Burden:** The most valuable resource for any coach, particularly the vast majority who are volunteers, is time. A technology solution that is perceived as complex, difficult to learn, or that adds to the weekly planning burden is destined for failure. This is the primary reason for MOJO's success; its core value proposition is saving time and reducing stress for the volunteer coach.⁷ The proposed platform must be designed with an obsessive focus on user experience, ensuring that its powerful features are delivered through a simple, intuitive interface that automates work rather than creating more of it.
- **Cultural Inertia and Tech-Aversion:** A segment of the coaching community remains skeptical of or resistant to new technology, preferring traditional methods. Overcoming this inertia requires more than just a good product; it requires excellent onboarding, continuous support, and education. The model used by The Coaching Manual, which provides clubs with a dedicated human account manager and expert-led training sessions, is an exemplary approach to mitigating this barrier and ensuring successful adoption.²⁰

2.3.2 Accelerants to Adoption

- **The Competitive "Arms Race":** As pioneering clubs adopt advanced technologies and see results, a powerful "fear of falling behind" spreads throughout the market. When one club in a league starts using sophisticated video analysis or data tracking, competing clubs feel immense pressure to invest in similar tools to maintain a competitive balance. This dynamic is a powerful accelerant for technology adoption.
- **Rising Parental Expectations:** As parents invest thousands of dollars annually in club fees, their expectations for professionalism and communication rise accordingly. They are no longer satisfied with disorganized coaching and sporadic email updates. They expect a modern, tech-enabled experience that includes access to their child's progress, clear communication channels, and evidence of a structured development plan. This consumer pressure forces clubs to seek out and adopt platforms that can meet these expectations.
- **The Influence of the Director of Coaching:** In clubs with a formal leadership structure, the DOC is the single most powerful accelerant for change. A top-down mandate from a respected DOC who has chosen a platform as the club's official system for development is the most effective way to ensure club-wide adoption. The platform's strategy of focusing on the DOC's needs is designed to leverage this specific dynamic, turning the DOC into the platform's internal champion and driving implementation across all teams.

Section 3: The Competitive Arena: An Analysis of Market Incumbents

3.1 Defining the Playing Field: Direct, Indirect, and Ancillary Competitors

A precise definition of the competitive landscape is crucial for strategic positioning. The market for youth soccer technology can be segmented into three distinct

categories.

- **Direct Competitors:** A direct competitor would offer an integrated, AI-driven platform designed to manage and automate the implementation of a club's curriculum across all stakeholders (DOC, coach, player, parent). At present, the research indicates that **no true direct competitor exists in the market**. This absence represents the primary strategic opportunity and validates the core premise of the proposed platform.
- **Indirect Competitors (The "Point Solution" Providers):** This is the primary competitive set. These are well-established, often well-funded companies that solve one or two parts of the youth soccer problem exceptionally well, but do not offer a holistic, integrated solution. They force clubs and coaches to act as manual integrators, piecing together disparate systems. This category includes:
 - **Video Analysis & Recording:** Hudl, Veo
 - **Content & Curriculum Libraries:** The Coaching Manual
 - **Team Management & Volunteer Coach Enablement:** MOJO
 - **Individual Player Skill Development & Tracking:** Techne Futbol, Playermaker/CITYPLAY
- **Ancillary Competitors:** This category includes general-purpose team management applications like TeamSnap. While widely used for scheduling, roster management, and basic communication, they lack any specialized soccer development content or coaching tools.¹² They solve the parent's "Administrator" job but do not address the core development needs of the DOC, coach, or player. They represent a baseline level of functionality that the proposed platform must exceed.

3.2 Competitor Deep Dive & Feature Comparison Matrix

To fully appreciate the strategic opening in the market, a detailed analysis of the major indirect competitors is necessary. The following matrix provides a visual representation of their capabilities mapped against the core functional areas of the proposed platform. This starkly illustrates the "integration gap" that the new platform is designed to fill.

Feature / Job-to-be-Done	Proposed Platform	Hudl	Veo	The Coaching	MOJO	Techne Futbol	Playermaker/CITYPLAY
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				Manual			
DOC / Club Management							
Club-wide Curriculum Library	Yes	No	No	Partial	No	Partial	No
AI Season/Session Planning Engine	Yes	No	No	No	No	No	No
Coach Engagement Analytics	Yes	No	No	No	No	Partial	No
Player Development Tracking	Yes	Partial	No	No	No	Yes	Yes
Parent Communication Portal	Yes	No	No	No	Yes	No	No
Coach Planning & Execution							
Season/Phase	Yes	No	No	Yes	Partial	No	No

Planner							
Automated Session Plan Generator	Yes	No	No	No	Yes	No	No
Video Drill Library	Yes	Partial	No	Yes	Yes	Yes	No
Custom Drill/Session Creator	Yes	No	No	Yes	Yes	No	No
Game Film Upload/Storage	Yes	Yes	Yes	No	No	No	No
Video Analysis & Feedback							
AI-Automated Game Recording	(Hardware Agnostic)	Partial (Focus)	Yes	No	No	No	No
AI-Automated Ball Tracking	Yes (Post-Process)	Yes (Assist+)	Yes	No	No	No	No
Manual Tagging/Telestrat	Yes	Yes	Yes	No	No	No	No

ion							
AI-Generated Game Summaries	Yes	Yes (Assist+)	No	No	No	No	No
Individual Player Playlists	Yes	Yes	Yes	No	No	No	No
Player Engagement & Dev.							
Individual Development Plan (IDP)	Yes	No	No	No	No	Yes	Yes
At-Home "Homework" Drills	Yes	No	No	Yes (TopTekkers)	Yes (MOJO+)	Yes	Yes
Gamified Progress Tracking	Yes	No	No	Yes (TopTekkers)	Partial	Yes	Yes
Tactical Quizzes	Yes	No	No	No	No	No	No
Wearable Performance Metrics	No	Partial (Titan)	No	No	No	No	Yes

3.2.1 The Video Analysis Giants: Hudl & Veo

- **Core Value Proposition:** These companies provide teams with the ability to record, analyze, and share game footage at a professional level. Hudl is a software-centric ecosystem that includes analysis tools, communication features, and recruiting profiles, complemented by its Hudl Focus line of automated cameras.⁵ Veo is a hardware-first company whose primary product is an AI-powered camera that films and follows the action without a human operator, paired with a software platform for viewing and clipping highlights.⁶
- **Strengths:** They are the undisputed leaders in game analysis. Hudl's recent introduction of Assist+ and AI Insights demonstrates a commitment to deepening its analytical capabilities, automatically generating performance summaries and tracking player actions.¹¹ Veo's strength lies in its simplicity of capture; its camera has made recording games accessible to thousands of teams that lack the resources for a dedicated videographer.⁶ Both platforms excel at creating individual player playlists and highlights, which are invaluable for player feedback and college recruiting.
- **Weaknesses and Strategic Gap:** The fundamental weakness of both Hudl and Veo is that they are *analytic* and *diagnostic* tools, not *prescriptive* or *planning* tools. They do an excellent job of telling a coach *what happened* in the previous game. However, they provide no native functionality to help the coach plan *what to do next*. The coach is left with a wealth of data but must manually translate those insights into a training plan for the upcoming week. They must leave the Hudl or Veo ecosystem to find relevant drills, structure a session, and connect it back to the performance issues identified in the video. This creates a significant data analysis and planning burden on the coach, which the proposed platform's AI engine is designed to eliminate.

3.2.2 The Content & Curriculum Platform: The Coaching Manual (TCM)

- **Core Value Proposition:** The Coaching Manual serves as a comprehensive digital library of professional coaching content. It offers thousands of high-quality videos, animated drills, session plans, and coaching guides created by world-class coaches.²¹

- **Strengths:** The quality and depth of its content are its primary assets. TCM has also made strides toward enabling club-wide curriculum management with features like "Season Plans" and "Folders," which allow a DOC to organize and distribute approved content to their coaches.²⁰ Their B2B offerings, including dedicated account managers and expert training, show an understanding of the support needs of larger organizations.²⁰ They also offer a companion player app, TopTekkers, for at-home skill development.²³
- **Weaknesses and Strategic Gap:** Despite its rich content library, TCM is fundamentally a *static resource*. It provides the coach with all the necessary *ingredients* (drills, session plans) but lacks the intelligent engine to automatically assemble those ingredients into a coherent, season-long meal. A coach must still invest significant time and effort to search the library, select appropriate drills, and structure them into a session that addresses their team's specific needs. The platform does not connect to game performance data, nor does it automate the planning process. It improves the quality of resources available to a coach but does not fundamentally reduce their planning workload.

3.2.3 The Team Management & Volunteer Coach Tool: MOJO

- **Core Value Proposition:** MOJO is designed to be the simplest, fastest, and most enjoyable way for a volunteer parent-coach to manage their team and run a practice.⁷
- **Strengths:** MOJO's primary strength is its brilliant understanding of its target user: the time-crunched, often inexperienced, volunteer coach. Its freemium business model has allowed for massive user acquisition, making it a ubiquitous presence in recreational sports.²⁴ The app excels at simplifying logistics like scheduling and communication, and its "one-click" practice plan generator, filled with fun, easy-to-run, video-based activities, is a lifesaver for its target audience.⁷
- **Weaknesses and Strategic Gap:** MOJO's greatest strength is also its defining weakness in the context of a sophisticated club. The platform is explicitly designed for the grassroots level and prioritizes ease-of-use over methodological rigor. Its content is generic and not designed to be aligned with a specific club's curriculum or philosophy. A DOC cannot use MOJO to implement, track, or enforce a club-wide game model. It is a bottom-up tool that empowers individual coaches but provides no mechanism for top-down strategic management, leaving a wide-open opportunity for a platform designed to do exactly that.

3.2.4 The Player Development Specialists: Techne Futbol & Playermaker (CITYPLAY)

- **Core Value Proposition:** This category of competitors focuses on empowering the individual player to take ownership of their development outside of formal team practices. Techne Futbol is a mobile app that provides a structured curriculum of at-home technical drills, using leaderboards and gamification to drive motivation.⁸ Playermaker's CITYPLAY is a cleat-mounted wearable sensor that tracks a host of physical and technical metrics, such as distance covered, number of touches, kick velocity, and touch balance between feet, providing players and coaches with objective performance data.⁹
- **Strengths:** Both platforms are exceptional at driving player engagement. Techne's gamified progression system and leaderboards create a compelling motivation loop.⁸ CITYPLAY provides players with data-driven insights that were once only available to professional athletes, making their development tangible and measurable.⁹ Crucially, clubs have demonstrated a clear willingness to pay for these tools, often bundling the subscription costs into their club fees, which validates the market for player-centric technology.²⁶
- **Weaknesses and Strategic Gap:** The critical weakness of these tools is their disconnection from the team's collective tactical plan. A player can spend hours mastering a complex dribbling move in Techne, but this individual skill development may not be connected to the team's tactical focus for the week (e.g., improving speed of play through one- and two-touch passing). Similarly, CITYPLAY provides a wealth of objective data, but it is incumbent upon the coach or player to interpret that data and manually connect it to the team's tactical objectives. The proposed platform can bridge this gap by ensuring that the player's "homework" and individual development goals are directly linked to and derived from the team's weekly and seasonal plan.

3.3 Pricing Models and Market Tiers: A Review of Competitor Monetization Strategies

The competitive landscape reveals a variety of successful and validated pricing

strategies. A comprehensive understanding of these models is essential for developing a competitive and effective pricing structure for the new platform.

- **Hardware + Subscription:** This model is exemplified by Veo. Clubs or teams make a significant upfront capital investment in the AI camera and then pay a recurring subscription fee for access to the software platform, video processing, and storage.⁶ This model creates a high barrier to entry but can lead to strong customer loyalty due to the sunk cost of the hardware.
- **Tiered SaaS (B2C, B2B, B2B2C):** This is the most common model, used by Hudl, The Coaching Manual, and Techne Futbol. They offer a range of packages tailored to different customer segments:
 - **Individual (B2C):** A subscription for a single coach or player (e.g., TCM Premium for ~\$60/year, Techne PRO for ~\$280/year).⁸
 - **Team (B2B):** A package sold to a single team (e.g., Techne Team for \$1500/year).¹⁰
 - **Club/Organization (B2B):** An enterprise-level package sold to an entire club or league, often with custom pricing and additional support features.¹⁰ This model allows for multiple revenue streams and entry points.
- **Freemium with Premium Upsell:** This model is masterfully executed by MOJO. The core team management and practice planning app is free for coaches and parents, which drives massive, low-cost user acquisition.⁷ Revenue is generated through partnerships with leagues and organizations, and through a premium "MOJO+" subscription sold to parents for at-home games and activities.⁷
- **Wearable + Membership:** This model is used by Playermaker/CITYPLAY. The customer purchases a membership plan (e.g., monthly, annual, bi-annual), which includes the wearable sensor hardware.⁹ The hardware is intrinsically linked to the recurring subscription; if the membership lapses, the utility of the hardware is diminished or eliminated. This model ensures a steady stream of recurring revenue and ties the customer to the ecosystem.

The diversity of these successful models indicates market tolerance for various pricing structures. It strongly suggests that a hybrid approach, combining a freemium entry point to drive acquisition with tiered SaaS packages for teams and clubs to drive revenue, would be the most effective strategy for the proposed platform.

Section 4: Validated Customer Personas: The "Jobs-to-be-Done"

The initial "Jobs-to-be-Done" (JTBD) framework provides a robust foundation for understanding the needs of each key stakeholder.¹ The following analysis validates and enriches this framework with evidence from the market and competitive landscape, revealing a deeply interconnected system of needs.

4.1 The Director of Coaching (DOC): The Strategist, Manager, and Analyst

- **Pain Points Validated:** The research strongly validates the core pain points of the DOC. The primary frustration is the chasm between their strategic vision for player development and the inconsistent reality of its implementation on the field. The current method of disseminating a curriculum via "links sent out via email" is universally recognized as ineffective [User Query]. This leads to the deep-seated emotional "job" of reducing the anxiety that comes from inconsistent coaching quality and the fear that the club's brand and reputation are not being upheld on every field.¹ The very existence of official documents from governing bodies like US Youth Soccer on topics such as "The Administrators Role in Player Development" and "Implementing a Club-Wide Parent Education Program" confirms that these challenges are not unique but are central concerns for any serious youth soccer organization.²⁷ The proposed platform is designed to be the operational tool that brings these strategic documents to life.
- **Key Data Needs and Unmet "Jobs":** The DOC's most critical unmet need is for actionable data and analytics. To effectively perform their "Analyst" job, they require a dashboard that answers fundamental questions:
 - **Coach Engagement:** Are my coaches logging in? Are they using the planning tools? Are they reviewing the weekly topics?
 - **Curriculum Adherence:** Are the session plans being generated and used by coaches aligned with the club's designated weekly or phase-based focus?
 - **Player Development:** Are players across the club progressing against their Individual Development Plans (IDPs)? Can we identify trends in skill acquisition or tactical understanding at specific age groups (e.g., are our U12s successfully learning to play out from the back)?The "DOC Analytics Dashboard" hypothesis 1 directly targets this high-value, entirely unmet need. No competitor in the market provides this level of strategic, club-wide oversight.

4.2 The Coach (Dual Persona Analysis): The Professional vs. The Volunteer

- **Pain Points Validated:** The single, unifying pain point for all coaches is a lack of time. The user query explicitly states that coaches "still need to spend a lot of time planning and to be honest, many do not" [User Query]. This creates a vicious cycle of unpreparedness, leading to less effective sessions and slower player development. The entire business model of MOJO is predicated on solving this one problem for the volunteer coach.⁷ The immense volume of available coaching resources, such as the hundreds of documents on the US Youth Soccer website ²⁷, paradoxically contributes to the problem. Coaches are drowning in information; what they desperately need are curated, actionable, and easy-to-implement plans.
- **Differentiated Workflows and Needs:** A successful platform must recognize and serve the distinct needs of two primary coach personas:
 - **The Volunteer Coach:** This coach is typically a parent with limited time and formal coaching education. Their primary "job" is to show up to practice feeling prepared, confident, and capable of running an engaging session that the kids will enjoy.¹ They need a "done-for-me" solution. The AI Planning Engine must be able to generate a complete, age-appropriate, and fun session plan with a single click, complete with video demonstrations of each drill. This directly competes with MOJO's core functionality but within the framework of the club's specific curriculum.
 - **The Professional Coach:** This coach is licensed, experienced, and paid. They value efficiency but also demand control and flexibility. They need a "do-it-for-me-but-let-me-tweak-it" solution. For this persona, the AI Planning Engine serves as a powerful assistant. It can generate a baseline session plan based on the club's curriculum and recent game analysis, saving the coach hours of initial planning. The coach can then use their expertise to modify the plan, substitute drills, and add their own coaching points, adapting it to their team's unique strengths, weaknesses, and personality. This empowers the professional coach without constraining them.

4.3 The Player (Multi-Segment Analysis): Needs and Motivations from U6 to U19

- **Needs and Motivations Validated:** The market provides strong validation for the segmented JTBD framework for players.¹ Different technology solutions have

successfully targeted the distinct needs of players at different stages of their development journey:

- **U6-U10 (Fun & Fundamentals):** This segment's "job" is to learn basic motor skills and develop a love for the game through fun activities. MOJO's library of engaging, game-based drills is perfectly aligned with this need.⁷
- **U11-U14 (Mastery & Tactics):** As players mature, their motivation shifts towards achieving a sense of mastery and understanding basic tactical concepts. Techne Futbol caters directly to this by providing a structured path to master core techniques and track personal improvement over time.⁸
- **U15-U19 (Execution & Pathway):** For older, more serious players, the focus shifts to executing complex tactics and managing their pathway to the next level (e.g., college soccer). The use of Hudl for creating recruiting highlight reels and for advanced self-analysis of game film directly serves this segment's "job" of being seen as a "smart player" with high-level potential.¹¹
- **Engagement Strategy: The Primacy of Video and Gamification:** To capture and retain the attention of players who are digital natives, the platform's player-facing components must be highly interactive and visually engaging. Learning must feel less like "homework" and more like a combination of a video game and a social media app. The proposed features of gamified progress tracking (earning points, badges, or levels, similar to Techne's "sock system" ⁸) and interactive tactical quizzes are essential. Quizzes, in particular, are a powerful and underutilized tool. A pre-quiz can establish a baseline of tactical knowledge, followed by video-based learning modules, and then a post-quiz to measure improvement. This creates a tangible, engaging, and measurable learning loop for the player.

4.4 The Parent: The Administrator, Supporter, and Co-Developer

- **Pain Points Validated:** The research confirms that parents grapple with two primary frustrations: communication chaos and a lack of transparency. The "Administrator" job of knowing schedules, locations, and logistics has been the foundation for successful apps like TeamSnap and MOJO, which centralize this information.⁷ However, this only solves part of the problem.
- **The "Supporter" and "Co-Developer" Gap:** The most significant unmet need for parents lies in their roles as "Supporters" and "Co-Developers".¹ Parents, who are making a significant investment of time and money, want to feel informed about the development process. They want to have constructive conversations with

their child about what they are learning, but they often lack the specific knowledge to do so. This is a major source of the emotional "job" of wanting to feel confident that their investment is worthwhile.¹ No current platform effectively bridges this educational gap. By creating a dedicated Parent Portal within the app, the platform can provide unprecedented value. This portal would show parents:

- The team's training topic for the week.
- The key coaching points (translated into simple, parent-friendly language).
- Links to the specific "homework" their child has been assigned in the player app.

This simple set of features transforms the parent from an anxious or uninformed spectator into an educated, aligned, and constructive supporter. It demystifies the development process, reduces friction between parents and coaches, and directly addresses the parent's deep-seated emotional need to feel "in the loop" and assured about their child's experience. This functionality is a powerful driver of parent satisfaction and, by extension, player retention for the club.

The interconnectedness of these four personas reveals the platform's ultimate strategic power. It is not merely a collection of features for four separate user groups, but a single, cohesive system that creates a virtuous cycle. The DOC sets the strategy, the AI translates it into actionable plans for the coach, the player engages with the plan on the field and at home, and the parent is brought into the process as an informed supporter. The data generated from this entire loop then flows back to the DOC's dashboard, allowing for continuous analysis, refinement, and improvement. This closed-loop system is a profound advantage that no siloed competitor can offer.

Section 5: SWOT Analysis

This analysis synthesizes the findings from the market, competitive, and customer research into a strategic framework of Strengths, Weaknesses, Opportunities, and Threats for the proposed AI-powered platform.

5.1 Strengths (Internal, Positive)

- **Integrated, All-in-One Vision:** The platform's core concept as a unified "operating system" for a youth soccer club is its greatest strength. It directly addresses the primary market weakness: the fragmentation caused by numerous single-purpose "point solutions." By design, it eliminates the need for coaches and DOCs to manually stitch together disparate tools for video, planning, and communication.
- **AI-Powered Planning Engine:** The conceptual AI engine is a unique and technologically defensible advantage. While competitors use AI for analysis (Hudl) or camera control (Veo), this platform envisions using AI for *synthesis and creation*. The ability to automatically generate customized, curriculum-aligned training plans based on game analysis is a revolutionary step-change in coaching efficiency and effectiveness.¹³
- **DOC-Centric Approach:** The platform is uniquely designed to solve the high-value problems of the Director of Coaching—the key strategic decision-maker and budget-holder in a sophisticated club. Features like the curriculum management module and the analytics dashboard are tailored to the DOC's "Jobs-to-be-Done," making the platform a strategic asset for club leadership, not just another tactical tool for coaches.¹
- **Closed-Loop Data System:** The platform creates a virtuous cycle of data. It pushes plans down from the DOC to coaches and players and pulls engagement and performance data back up to the DOC's dashboard. This closed loop allows for continuous, data-driven improvement of both the club's curriculum and the platform's AI models, creating a powerful network effect and a deepening competitive moat over time.

5.2 Weaknesses (Internal, Negative)

- **Execution and Complexity Risk:** The ambition of being an "all-in-one" solution carries the inherent risk of becoming a "master of none." If the user experience is not carefully and elegantly designed for each distinct persona, the platform could feel bloated and confusing. Maintaining simplicity and intuitive navigation for the time-poor volunteer coach, the demanding professional coach, the young player, and the non-technical parent is a significant design and engineering challenge.
- **Content Creation and Curation Burden:** A platform centered on video-rich learning will be perpetually hungry for high-quality content. Building an initial

library of drills, tactical explanations, and session plans will require a significant upfront investment. Furthermore, to stay relevant and engaging, this content library will need to be continuously updated and expanded, representing an ongoing operational cost.

- **Complex Sales and Onboarding Cycle:** Unlike a simple B2C app, selling a club-wide enterprise solution involves a longer and more complex sales process. It requires identifying the right decision-makers (the DOC and club board), demonstrating a clear ROI, and navigating budget cycles. Furthermore, successfully onboarding an entire club—from the DOC to hundreds of coaches, players, and parents—is a significant undertaking that will require a dedicated customer success and support infrastructure, similar to what The Coaching Manual offers.²⁰

5.3 Opportunities (External, Positive)

- **Market Fragmentation and the "Integration Gap":** As detailed extensively, the current market is composed of powerful but siloed competitors. No single incumbent offers a truly integrated solution that connects strategic planning with on-field execution and player development. This "integration gap" is the single largest market opportunity, waiting to be filled by a platform built on a philosophy of unification and workflow automation.
- **Increasing Technology Adoption and Rising Expectations:** Youth sports is no longer a tech-averse industry. Clubs, coaches, and parents are increasingly willing to invest in technology that provides a competitive advantage, enhances the player experience, or simplifies administrative burdens.¹² The "professionalization" of youth clubs and rising parental expectations create a powerful tailwind, driving demand for sophisticated, all-encompassing solutions.
- **Demand for Structured Development and Methodological Rigor:** There is a clear trend away from unstructured, "roll the balls out" coaching towards more professionalized club structures with defined game models and development philosophies. This shift creates a strong demand for tools that can help a DOC implement, manage, and monitor that methodology at scale, which is precisely the problem the platform is designed to solve.

5.4 Threats (External, Negative)

- **Incumbent Competitive Response:** The most significant threat would be a strategic response from an established market leader. A company like Hudl, with its massive user base, brand recognition, and significant engineering resources, could theoretically decide to build or acquire its way into the integrated platform space. While their current product architecture is not built for this, their market position makes them a formidable potential threat.
- **Market Saturation at the Low End:** The success of free and "freemium" tools, particularly MOJO, has conditioned the recreational and volunteer-led segment of the market to expect team management and basic planning tools at no cost.⁷ This could make it challenging to acquire these teams and convert them to paid tiers without an extremely compelling and robust free offering.
- **Economic Headwinds and Budget Scrutiny:** The youth sports market is not immune to broader economic pressures. During an economic downturn, discretionary spending is often the first to be cut. Club and parent budgets for "non-essential" technology could face scrutiny. The platform must be positioned not as a luxury or an added cost, but as a fundamental investment in efficiency and quality that provides a clear and defensible return, potentially by consolidating the costs of multiple other services.

Section 6: Strategic Recommendations for Product & Market Entry

The final section translates the comprehensive market analysis into a set of actionable strategic recommendations designed to guide product development, market positioning, and a successful go-to-market launch.

6.1 Product Positioning: Defining Your Unique Value Proposition (UVP)

To cut through the noise of a crowded market, the platform requires a clear, concise, and compelling Unique Value Proposition (UVP). It must immediately communicate its core differentiation from the existing array of point solutions.

The recommended UVP is: **"The AI-powered operating system for youth soccer clubs, transforming your methodology into measurable development."**

This positioning statement is strategically crafted to achieve several goals:

- **"AI-powered operating system"** immediately elevates the platform above a simple "tool" or "app." It positions it as a foundational, indispensable system that a club runs on, much like a business runs on a CRM or ERP. It highlights the core technology (AI) and the integrated nature (operating system).
- **"for youth soccer clubs"** clearly defines the target market, speaking directly to the organizational leaders who are the primary buyers.
- **"transforming your methodology"** speaks directly to the DOC's primary "job." It acknowledges that the club already has a philosophy and positions the platform as the vehicle to bring that philosophy to life, rather than imposing a new one.
- **"into measurable development"** provides the crucial "what's in it for me?" It promises a tangible outcome—provable, trackable player and program improvement—which justifies the investment and addresses the core desire of every stakeholder.

6.2 Key Differentiators: The "Must-Have" Features for Market Disruption

While the platform will have a broad feature set, success hinges on executing three core, interconnected differentiators at a world-class level. These are the features that create the defensible moat and deliver on the UVP.

6.2.1 The AI Planning Engine

This is the technological crown jewel. It is the engine that drives the entire workflow. Its "must-have" capabilities include the ability to:

- **Ingest and Synthesize:** Process multiple inputs simultaneously: the club's static curriculum/game model, the specific team's age and ability profile, and tactical analysis from recently uploaded game footage.
- **Generate Intelligent Plans:** Automatically produce coherent and progressive season, multi-week phase, and individual weekly training plans that are

customized for each team.

- **Provide Flexibility:** Allow professional coaches to easily modify, customize, and supplement the AI-generated plans, while providing a "one-click" complete plan for volunteer coaches.

6.2.2 The DOC Analytics Dashboard

This is the command center and the primary reason a club will make an enterprise-level investment. It must provide the DOC with clear, at-a-glance, actionable intelligence, including:

- **Engagement Metrics:** Visualizations of coach login frequency, session plan creation, and use of the platform's features.
- **Adherence Metrics:** Analysis of whether the training sessions being conducted align with the club-wide curriculum focus for that period.
- **Development Metrics:** Club-wide tracking of player progress against IDPs and tactical quiz scores, allowing the DOC to identify programmatic strengths and weaknesses across age groups.

6.2.3 The Player-Coach-Parent Engagement Loop

This is the feature set that makes the platform "sticky" and demonstrates value to every stakeholder. The seamless workflow must be flawlessly executed:

- A coach assigns curriculum-aligned "homework" (technical drills or tactical video quizzes) through the app.
 - The player receives a notification and completes the assignment within a fun, engaging, and gamified interface on their own device.
 - The parent can view their child's assignments and progress in their own dedicated portal, facilitating informed and constructive support.
- This closed loop builds engagement, reinforces learning, and makes the value of the club's program tangible to the family.

6.3 Go-to-Market Strategy: Phased Rollout and Target Customer Acquisition

A disciplined, phased approach to market entry will maximize the chances of success by allowing for product refinement and the building of market credibility.

- **Phase 1: Founder's Club Pilot Program (Months 1-6):** The initial launch should not be to the general public. Instead, partner with your own club and 2-3 other forward-thinking "innovator" clubs that fit the ideal customer profile. Offer them free or deeply discounted access in exchange for intensive feedback. This phase is critical for real-world testing, bug fixing, and generating the first set of powerful case studies and testimonials.
- **Phase 2: Targeted "SAM" Penetration (Months 7-24):** With a refined product and strong case studies, the focus shifts to a targeted sales and marketing effort aimed squarely at the Serviceable Addressable Market (SAM). This means identifying and directly approaching clubs with established DOCs, defined development philosophies, and a demonstrated willingness to invest in technology. Key marketing channels will include:
 - Presence at major coaching conventions and symposiums (e.g., the annual US Youth Soccer Workshop or the United Soccer Coaches Convention).
 - Content marketing (blogs, white papers, webinars) aimed at the DOC persona, focusing on topics like "Implementing a Club-Wide Game Model" and "Using Data to Measure Player Development."
 - Targeted digital advertising on platforms where coaches and club leaders congregate.
- **Phase 3: Broad Market Expansion and Freemium Acquisition (Months 25+):** Once the platform has established a strong foothold in the core SAM, the go-to-market strategy can broaden. This involves actively promoting the freemium tier to the wider market of individual teams and smaller clubs. This strategy, mirroring MOJO's success, serves as a low-cost customer acquisition funnel, creating a large base of users who can then be nurtured and upsold to premium coach or full club enterprise packages over time.

6.4 Pricing Strategy: A Tiered Model for Sustainable Growth

The pricing strategy must be flexible enough to capture different segments of the market while ensuring the business model is sustainable and profitable. A three-tiered

model, informed by competitor pricing, is recommended.

- **Tier 1: "Team" Plan (Freemium):**
 - **Price:** Free.
 - **Features:** Basic team management (roster, scheduling), parent communication tools, and access to a limited, rotating library of drills.
 - **Strategic Purpose:** This tier competes directly with MOJO and other free tools for mass-market user acquisition. It serves as the wide top of the sales funnel.
- **Tier 2: "Coach Pro" Plan:**
 - **Price: \$19.99 per month or \$199 per year.**
 - **Features:** All "Team" features, plus access to the full content library, advanced session planning and customization tools (without the full AI automation), and the ability to create and save custom drills.
 - **Strategic Purpose:** This provides a paid entry point for individual professional coaches or highly motivated volunteer coaches who want more power than the free tier offers. It establishes a B2C revenue stream and captures users who may not be in a position to influence a full club purchase. This pricing is competitive with individual plans from other services like Beast Mode Soccer Plus (\$19.99/month).¹⁵
- **Tier 3: "Club Enterprise" Plan:**
 - **Price: Tiered pricing based on the number of players, averaging \$30 - \$50 per player, per year.** This is billed annually to the club.
 - Example: A 500-player club would represent a \$15,000 - \$25,000 annual recurring revenue (ARR) contract.
 - **Features:** All "Coach Pro" features for every coach, plus the full suite of strategic tools: the AI Planning Engine, the DOC Analytics Dashboard, full curriculum integration and management, club-wide player development tracking, the Parent Portal, and dedicated onboarding and support.
 - **Strategic Purpose:** This is the core revenue driver of the business. The per-player pricing model scales with the size of the club and is a familiar model in the industry. The value proposition is extremely compelling: for a price that is often less than the combined cost of separate video, management, and player development tools²⁶, the club gets a fully integrated, automated operating system that delivers vastly more strategic value.

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