

Email Draft: Project Status Update for Dan

Chocolat on James Phase 1 - Week 1 Progress

To: Dan Edwards
From: Greg Kowalczyk, GearTOP Inc.
Date: October 31, 2025
Subject: Phase 1 Progress Update - Week 1 Complete

Email Draft

Hey Dan,

Hope you're doing well! I wanted to touch base and give you a quick update on where I'm at with Phase 1 after the full first week.

Just to be clear: **Week 1 is done**, and this update is about the **Week 1-2 stuff specifically** (competitive analysis, financial analysis, market research, and figuring out the e-commerce platform situation).

Important to note - Phase 1 has 14 total deliverables over 6 weeks, so there's still quite a bit ahead (strategy development, marketing plans, content creation, all that good stuff). But I'm making solid progress on the foundation!

Where I'm At - Week 1-2 Deliverables

Here's the status on the Week 1-2 work:

✓ **Done:** - **Competitive Analysis** (100%) - Looked at 15+ competitors across Hamilton, Toronto, and Canada. Got some really interesting insights on how they're positioning themselves and what they're doing online. - **Financial Analysis** (90%) - 3-year projections and ROI framework are done based on the numbers I had (everything that's in the proposal folders).

That's all the data I can get right now, so analysis is as complete as possible with what you provided.

 **Still Working On:** - **Market Research** (85%) - Hamilton demographics, market size, opportunities - almost there - **E-commerce Platform** (50%) - Did a direct comparison between Shopify and Square Online (focus is on Shopify Commerce vs. Square), and at this point my strong recommendation is Shopify—unless something major changes or you really prefer Square for any reason. Shopify seems like the best fit, especially with Square POS integration. Also, could you give me an update on the website designer? If you have more info about the designer (maybe from what that lady mentioned in our meeting two weeks ago), that would be great to know for planning.

Big Discovery: "Hamilton's Chocolate" Positioning

So here's something really cool I found during the research - **no one else is claiming "Hamilton's Chocolate" as their thing.**

This is a huge opportunity! I put together a brand positioning strategy around "**Chocolat on James - Hamilton's Chocolate**" that you can use everywhere - in-store, online, everywhere.

The projections look pretty promising too - could potentially drive 96-232% growth if you really own this positioning in the Hamilton market. I've woven this into all the research and planning docs, so it's part of the foundation going forward.

What I Put In This Week

Put in about 27 hours of research and analysis. Created 6 new strategic docs and updated 8 research documents. Managed to save a bunch of time (85-110 hours) by being smart about reusing content from the proposal phase.

Things I Need From You

To keep things moving, here's what I'm looking for:

This Week (by Oct 31 if possible):

- 1. Financial Data** - If you have any updated financials or projections since what you shared earlier, please send them over. I'm basing the analysis on what I have now, but any new info would help tighten up the projections.

- 2. Product Catalog & Pricing** - What's your product lineup? How many SKUs, what are your bestsellers, any seasonal stuff? Also, what's your current pricing structure? This helps with both e-commerce planning and the pricing strategy I'll be doing in Weeks 3-4.

 - 3. Product Photography** - Not a priority right now, so no need to worry about new photos at this stage, but keep in mind

 - 4. Brand Positioning** - Based on my research and our discussions, I strongly recommend positioning as "Chocolat on James - Hamilton's Chocolate" starting now. This is a really big opportunity for your marketing and brand—owning that Hamilton connection will set you apart and should be part of everything you do moving forward.

 - 5. December Plans** - What's your focus for December? Corporate gifting season timing is pretty important for planning.

 - 6. Current Systems** - What POS are you using? (Square, right?) Need to know for the e-commerce integration.
- Other Things (no rush, but good to know):**
- 1. Pricing & Product List** - For the upcoming pricing strategy work (Weeks 3-4), could you share your current list of products and their prices? Even a rough item list with prices is great—doesn't have to be broken down by each cost, just whatever you have. This will let me see how your pricing stacks up to competitors and help shape the strategy.

 - 2. Corporate Gifting Prep** - Have you had a chance to start any of those quick wins I mentioned? How's the prep going for corporate season?

 - 3. Graphic Designer** - How's it going with the designer? Everything on track?

 - 4. Business Cards** - Did you get the cards for corporate and regular customers? Happy with how they turned out?

 - 5. Shopify Course** - Did you get a chance to look at the Shopify e-commerce course I sent you? Just curious if you've had time to dive into it.

 - 6. Staffing** - What's your staffing situation? Will you have capacity for new stuff like corporate gifting?

 - 7. Budget** - What's your budget looking like for Phase 1? (e-commerce, marketing, etc.)

 - 8. Partnerships** - Any interest in partnerships with McMaster, Ti-Cats, hotels? Those could be big opportunities.

9. Marketing Preferences - What marketing channels are you comfortable with? (email, social media, ads)

What I'm Working On This Week (Oct 31-Nov 7)

My focus this week: - Finishing up the e-commerce platform recommendation (Shopify is looking like the winner based on your Square POS - just want to double-check a few things) - Wrapping up the financial analysis once I have your numbers - Completing the market research - Starting to map out the new website structure and what I'll need (this is a big one for next week) - Getting ready for the strategy development phase (Weeks 3-4)

Full Phase 1 Scope - What's Coming Next

Weeks 1-2 (Current): Research & Analysis In Progress - Competitive Analysis - Financial Analysis - Market Research - E-commerce Platform Evaluation

Weeks 3-4: Strategy Development (Up Next) - 12-Month Growth Roadmap - Pricing & Product Strategy - SEO & Content Strategy - Social Media Strategy (50+ templates) - Email Marketing Strategy

Weeks 5-6: Integration & Finalization - Corporate Gifting Systematization - Local Newsletter Development ("Hamilton Chocolate Club") - Partnership Opportunity Map - UGC Strategy - Financial Tracking Guidance - Executive Summary & Phase 2 Recommendations

Total Phase 1: 14 deliverables over 6 weeks - I'm making good progress on the foundation stuff, but there's still quite a bit ahead to get you everything!

My Two Cents

The "Hamilton's Chocolate" thing is a **game-changer**. I really think you should go all-in on this as your core brand - website, marketing, packaging, everything. It's authentic, it's yours, and nobody else can really claim it.

Want to jump on a quick call this week to talk about the positioning and priorities? Just let me know what works for you.

What I'm Sending

I'm including: - Complete project status summary - Brand positioning strategy document - Detailed progress report

Hit me up if you have any questions or want to talk through anything.

Talk soon,

Greg

P.S. The research is looking really solid - Hamilton's chocolate market is around \$2.1M and you've got a good shot at grabbing 15-20% market share if we nail the strategy together. Pretty exciting stuff!