

Phase 1 Deliverables Gap Analysis Report

Chocolat on James - Project Phase 1

Date: November 2025

Status: Gap Analysis Complete

Purpose: Map all existing files to 14 required deliverables and identify gaps

Executive Summary

This report maps all existing deliverables to the 14 required Phase 1 deliverables as specified in PRD-Phase1.md. The analysis identifies which deliverables are complete, which need consolidation, and which need creation.

Overall Status: - **Complete:** 7 deliverables (50%) - **Needs Consolidation/Enhancement:** 4 deliverables (29%) - **Missing:** 3 deliverables (21%)

Deliverable Mapping: Week 1-2 (Required: 4)

1. Competitive Analysis COMPLETE

Required: 10+ chocolate competitors benchmarked

Existing Files: - Week 1-2/ALL-DELIVERABLES/competitive-analysis-report.md
- Week 1-2/ALL-DELIVERABLES/competitive-analysis-report.pdf - 2. Competitive Analysis/proposal-competitive-analysis.md (if exists)

Status: Complete - 50+ competitors analyzed, comprehensive report exists

Action: Use existing file as-is

2. Website Audit COMPLETE

Required: Technical SEO and platform comparison

Existing Files: - Week 1-2/ALL-DELIVERABLES/comprehensive-technical-analysis.md - Week 1-2/ALL-DELIVERABLES/comprehensive-technical-analysis.pdf - Week 1-2/ALL-DELIVERABLES/PAVE - 4. Website Audit/ folder (if exists)

Status: Complete - Technical analysis and platform comparison exist

Action: Use existing files as-is

3. Financial Analysis COMPLETE

Required: Revenue trends and 3-year projections

Existing Files: - Week 1-2/ALL-DELIVERABLES/financial-analysis-report.md - Week 1-2/ALL-DELIVERABLES/financial-analysis-report.pdf - 5. Financial Analysis/financial-analysis-report (if exists)

Status: Complete - Financial analysis with projections exists

Action: Use existing file as-is

4. Market Research COMPLETE

Required: Hamilton demographics and opportunity sizing

Existing Files: - Week 1-2/ALL-DELIVERABLES/COMPREHENSIVE-MARKET-RESEARCH-REPORT.md - Week 1-2/ALL-DELIVERABLES/COMPREHENSIVE-MARKET-RESEARCH-REPORT.pdf - Week 3-4/ALL-DELIVERABLES/Hamilton Market Research Report - Updated Nov 11, 2025.pdf - 3. Market Research/ folder (if exists)

Status: Complete - Comprehensive market research exists

Action: Use existing files as-is

Deliverable Mapping: Week 3-4 (Required: 10)

5. 12-Month Growth Roadmap COMPLETE

Required: Implementation plan with milestones

Existing Files: - Week 3-4/ALL-DELIVERABLES/GROWTH-ROADMAP-12-MONTH-NOV2025.md - Week 3-4/ALL-DELIVERABLES/GROWTH-ROADMAP-12-MONTH-NOV2025.pdf - Week 3-4/Growth Strategy/GROWTH-ROADMAP-12-MONTH-NOV2025.md

Status: Complete - Month-by-month execution plan exists

Action Required: - Replace Shopify references with Pavement - Use existing file after platform update

6. Pricing & Product Strategy COMPLETE

Required: Benchmarking and optimization

Existing Files: - Week 3-4/ALL-DELIVERABLES/PRICING-PRODUCT-STRATEGY-NOV2025.md - Week 3-4/ALL-DELIVERABLES/PRICING-PRODUCT-STRATEGY-NOV2025.pdf - Week 3-4/Growth Strategy/PRICING-PRODUCT-STRATEGY-NOV2025.md - 14. Pricing & Product Strategy/ folder (if exists)

Status: Complete - Pricing optimization and product strategy exists

Action: Use existing file as-is

7. SEO & Content Strategy COMPLETE

Required: Keyword research and content calendar

Existing Files: - Week 3-4/ALL-DELIVERABLES/SEO-KEYWORD-REPORT-NOV2025.md (Keyword research) - Week 3-4/ALL-DELIVERABLES/SEO-ONPAGE-PLAYBOOK-NOV2025.md (On-page SEO) - Week 3-4/ALL-DELIVERABLES/CONTENT-PILLARS-BLOG-CALENDAR-2026.md (Content calendar) - Week 3-4/ALL-DELIVERABLES/LOCAL-SEO-PLAN-HAMILTON-NOV2025.md (Local SEO) - Week 3-4/SEO & Content/ folder - 6. SEO & Content Strategy/ folder (if exists)

Status: Complete - All 4 components exist (Keywords, On-Page, Blog Calendar, Local SEO)

Action Required: - Replace Shopify references with Pavement in SEO-ONPAGE-PLAYBOOK-NOV2025.md - Use existing files after platform update

8. Social Media Strategy NEEDS CONSOLIDATION

Required: Instagram strategy with 50+ templates

Existing Files: - Week 3-4/ALL-DELIVERABLES/CANVA-TEMPLATES-INDEX-NOV2025.md (50+ templates) - Week 3-4/Templates & Tools/CANVA-TEMPLATES-INDEX-NOV2025.md - Week 3-4/Templates & Tools/2. Template Production/ (Template library) - 7. Social Media Strategy/content-templates/ (if exists)

Status: Templates exist but may need full strategy document

Action Required: - Check if full strategy document exists in Social Media Strategy folder - If missing, consolidate templates into full strategy document OR create strategy doc that references templates - Use existing templates as-is

9. Email Marketing Strategy NEEDS CONSOLIDATION

Required: Templates and automation workflows

Existing Files: - Week 3-4/Templates & Tools/2. Template Production/Email Marketing Templates/COJ-Email-Templates-Welcome-Series.md - Week 3-4/Templates & Tools/2. Template Production/Email Marketing Templates/ - 8. Email Marketing Strategy/template-library/ (if exists) - Email templates referenced in CANVA-TEMPLATES-INDEX-NOV2025.md

Status: Templates exist but may need full strategy document

Action Required: - Check if full strategy document exists in Email Marketing Strategy folder - If missing, consolidate templates into full strategy document OR create strategy doc that references templates - Use existing templates as-is

10. Local Newsletter Development MISSING

Required: "Hamilton Chocolate Club" concept

Existing Files: - 13. Local Newsletter/ folder exists but appears empty - References to newsletter in various documents: - Week 1-2/ALL-DELIVERABLES/BRAND-POSITIONING-STRATEGY.md (mentions "Hamilton's Chocolate Newsletter") - Week 3-4/Templates & Tools/2. Template Production/Customer Survey Templates/COJ-Survey-Templates.md (newsletter references) - Week 3-4/Email Marketing/README.md (mentions Local Newsletter Strategy)

Status: Missing - Concept mentioned but no dedicated document

Action Required: - Create Local Newsletter Development document with "Hamilton Chocolate Club" concept - Reference existing newsletter mentions in other documents

11. Corporate Gifting Systematization NEEDS CONSOLIDATION

Required: Complete program with materials

Existing Files: - Week 3-4/Templates & Tools/2. Template Production/Corporate Outreach Templates/COJ-Corporate-Outreach-Kit.md - Week 3-4/Templates & Tools/2. Template Production/Price Quote Templates/COJ-Quote-and-Invoice-Templates.md (Corporate gifting quotes) - 9. Corporate Gifting/outreach-templates/ (if exists) - References in multiple documents (Growth Roadmap, Pricing Strategy, etc.)

Status: Templates exist but may need complete program document

Action Required: - Check if complete program document exists in Corporate Gifting folder - If missing, consolidate templates into full program document OR create program doc that references templates - Use existing templates as-is

12. Financial Tracking Guidance MISSING

Required: Accounting recommendations and templates

Existing Files: - 11. Financial Tracking Guidance/ folder exists but appears empty - Week 3-4/Templates & Tools/2. Template Production/Analytics Dashboard Templates/COJ-Analytics-Dashboard (Dashboard templates) - Financial analysis exists but no tracking guidance document

Status: Missing - No dedicated financial tracking guidance document

Action Required: - Create Financial Tracking Guidance document - Reference existing analytics dashboard templates - Include accounting recommendations

13. Partnership Opportunity Map MISSING

Required: Ti-Cats, McMaster, hotels, tourism

Existing Files: - 10. Partnership Opportunities/ folder exists but appears empty - Week 3-4/Templates & Tools/2. Template Production/Partnership Pitch Decks/COJ-Partnership-Pitch-Decks (Pitch templates) - References to partnerships in Growth Roadmap and other documents

Status: Missing - Pitch templates exist but no opportunity map document

Action Required: - Create Partnership Opportunity Map document - Include Ti-Cats, McMaster, hotels, tourism opportunities - Reference existing pitch deck templates

14. UGC Strategy NEEDS CONSOLIDATION

Required: User-generated content and review systems

Existing Files: - Week 3-4/Templates & Tools/2. Template Production/Contest & UGC Templates/C0J-UGC-Contest-Templates.md - 12. UGC Strategy/ folder exists but appears empty - UGC templates exist in multiple locations

Status: Templates exist but needs consolidation into strategy document

Action Required: - Consolidate UGC templates into full UGC Strategy document - Include review system strategy - Use existing templates as-is

Deliverable Mapping: Week 5-6 (Required: 4)

15. Executive Summary MISSING

Required: Comprehensive findings summary

Existing Files: - No dedicated Executive Summary document found - Various summary documents exist but not comprehensive: - Week 3-4/ALL-DELIVERABLES/EXECUTION-SUMMARY-NOV7-2025.md (Week 3-4 summary) - Week 1-2/ALL-DELIVERABLES/WEEK-1-2-INTEGRATION-REPORT.md (Week 1-2 summary) - Dashboard files with findings

Status: Missing - Needs creation

Action Required: - Create Executive Summary document - Synthesize findings from all weeks - Include key insights and recommendations

16. Phase 2 Recommendations MISSING

Required: E-commerce implementation plan (Pavement-focused)

Existing Files: - Week 3-4/ALL-DELIVERABLES/MARKET-EXPANSION-PLAN-NOV2025.md (3-year expansion) - Platform comparison documents - References to Phase 2 in PRD

Status: Missing - Needs creation (Pavement-focused, NOT Shopify)

Action Required: - Create Phase 2 Recommendations document - Focus on Pavement implementation - Reference existing research and expansion plan - **CRITICAL:** Do NOT reference Shopify - use Pavement only

17. Training Materials Status ALREADY DELIVERED

Required: Shopify Course Delivery - Training materials for Dale

Existing Files: - Course already delivered to Dale (he loves it, currently reviewing) - No document needed to create, but status should be documented

Status: Already Delivered - Document status only

Action Required: - Document status in appropriate place (Executive Summary or Follow-up Strategy) - Note: Dale loves the content and is reviewing it

18. Follow-up Strategy MISSING

Required: 30-day and 60-day check-ins

Existing Files: - No Follow-up Strategy document found - References to follow-ups in PRD

Status: Missing - Needs creation

Action Required: - Create Follow-up Strategy document - Include 30-day and 60-day check-in plans - Define success metrics and review processes

Summary by Status

Complete (7 deliverables - 50%)

1. Competitive Analysis
2. Website Audit
3. Financial Analysis
4. Market Research
5. 12-Month Growth Roadmap (needs Shopify→Pavement update)
6. Pricing & Product Strategy
7. SEO & Content Strategy (needs Shopify→Pavement update)

Needs Consolidation/Enhancement (4 deliverables - 29%)

8. Social Media Strategy (templates exist, may need strategy doc)
9. Email Marketing Strategy (templates exist, may need strategy doc)
10. Corporate Gifting Systematization (templates exist, may need program doc)
11. UGC Strategy (templates exist, needs consolidation)

Missing (3 deliverables - 21%)

10. Local Newsletter Development
11. Financial Tracking Guidance
12. Partnership Opportunity Map

Week 5-6 (3 missing + 1 status)

15. Executive Summary Missing
 16. Phase 2 Recommendations Missing (Pavement-focused)
 17. Training Materials Already Delivered (document status)
 18. Follow-up Strategy Missing
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Priority Actions

High Priority (Complete Missing Deliverables)

1. Create Local Newsletter Development document (#10)
2. Create Financial Tracking Guidance document (#12)
3. Create Partnership Opportunity Map document (#13)
4. Create Executive Summary (#15)
5. Create Phase 2 Recommendations (#16) - **CRITICAL: Pavement-focused, NOT Shopify**
6. Create Follow-up Strategy (#18)
7. Consolidate UGC Strategy (#14)

Medium Priority (Enhance Existing)

8. Update Growth Roadmap - Replace Shopify with Pavement
9. Update SEO On-Page Playbook - Replace Shopify with Pavement
10. Check/create Social Media Strategy document (#8)
11. Check/create Email Marketing Strategy document (#9)
12. Check/create Corporate Gifting Systematization document (#11)

Low Priority (Status Documentation)

13. Document Shopify course delivery status (#17)
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File Organization Notes

All existing deliverables are located in: - Week 1-2/ALL-DELIVERABLES/ (Week 1-2 deliverables)
- Week 3-4/ALL-DELIVERABLES/ (Week 3-4 deliverables) - Numbered folders (6-14) for specific deliverables - Week 3-4/Templates & Tools/ (Templates and tools)

Action: All existing files will be copied to submission folder, source files preserved.

Report Status: Complete

Next Steps: Begin completing missing deliverables per priority order

Last Updated: November 2025