

Follow-up Strategy

30-Day and 60-Day Check-ins - Phase 1 Deliverable #18

Date: November 2025

Prepared for: Dan Edwards & Dale, Chocolat on James

Status: Complete

Executive Summary

This document outlines the follow-up strategy for Phase 1 deliverables, including 30-day and 60-day check-ins, success metrics review, implementation support, and ongoing relationship management. The strategy ensures successful implementation of Phase 1 recommendations and maintains alignment with business goals.

Check-in Schedule: 30-day and 60-day post-submission

Support Model: Ongoing implementation support

Success Tracking: Key performance indicators (KPIs)

Follow-up Framework

Objectives

- 1. Implementation Support** - Ensure successful Phase 1 implementation - Address questions and challenges - Provide ongoing guidance - Optimize based on data
 - 2. Success Measurement** - Track key performance indicators (KPIs) - Review progress against targets - Identify optimization opportunities - Adjust strategy as needed
 - 3. Relationship Management** - Maintain ongoing communication - Build long-term partnership - Support Phase 2 planning - Ensure client satisfaction
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Check-in Schedule

30-Day Check-in (Post-Submission)

Timing: 30 days after Phase 1 submission

Purpose: Initial implementation review and support

Duration: 60-90 minutes

Agenda:

- 1. Implementation Status Review (15 minutes)** - Review Phase 1 deliverables understanding - Identify implemented recommendations - Discuss progress on priority actions - Address questions or clarifications
- 2. Q4 2025 Progress Review (20 minutes)** - Corporate gifting launch status - McMaster event execution (Nov 21-24) - Google Business Profile optimization - Email list building progress - Holiday marketing execution

3. Challenges & Opportunities (20 minutes) - Identify implementation challenges - Discuss resource constraints - Review timeline adjustments - Identify additional support needs

4. Q1 2026 Preparation (20 minutes) - E-commerce launch planning (Pavement) - Product photography scheduling - Platform setup progress - Valentine's Day campaign planning - Pricing implementation planning

5. Next Steps & Action Items (10 minutes) - Define action items - Set 30-day goals - Schedule 60-day check-in - Document decisions

Deliverables: - 30-day check-in summary document - Updated implementation timeline - Revised action items - Next steps documentation

60-Day Check-in (Post-Submission)

Timing: 60 days after Phase 1 submission

Purpose: Mid-term progress review and optimization

Duration: 90-120 minutes

Agenda:

1. Progress Review (30 minutes) - Review 30-day action items - Assess implementation progress - Review KPIs and metrics - Identify wins and challenges

2. Performance Analysis (20 minutes) - Review revenue performance (Q4 2025) - Analyze channel performance - Review marketing metrics - Assess ROI on investments

3. Strategy Optimization (30 minutes) - Identify optimization opportunities - Adjust strategy based on data - Revise timelines if needed - Prioritize high-impact actions

4. Q1 2026 Launch Preparation (20 minutes) - E-commerce launch readiness - Product photography status - Platform setup completion - Valentine's Day campaign readiness - Pricing implementation status

5. Phase 2 Planning (20 minutes) - Review Phase 2 recommendations - Discuss Phase 2 priorities - Plan Phase 2 kickoff - Set Phase 2 goals

Deliverables: - 60-day check-in summary document - Performance analysis report - Optimized implementation plan - Phase 2 preparation checklist - Next steps documentation

Success Metrics Tracking

Key Performance Indicators (KPIs)

Q4 2025 Metrics:

Corporate Gifting: - Accounts acquired: Target 7-15 - Revenue generated: Target \$15K-25K - Pipeline value: Track ongoing - Conversion rate: Track % closed

McMaster Event (Nov 21-24): - Pre-orders: Target \$5K-10K - Email captures: Target 100-200 - Corporate leads: Target 10-20 - Event execution: Success criteria met

Google Business Profile: - Profile completion: Target 100% - Photo uploads: Target 50+ - Review count: Target 10+ by check-in - Local Pack ranking: Track position

Email List: - Subscriber count: Target 300-500 by year-end - Growth rate: Track monthly - Open rate: Track campaign performance - Conversion rate: Track email revenue

Holiday Marketing: - Social media posts: Target 30+ posts - Email campaigns: Target 3-5 campaigns - Revenue impact: Track holiday sales - Engagement metrics: Track social engagement

Q1 2026 Metrics (60-Day Check-in)

E-commerce Launch: - Platform setup: Complete/in progress - Product uploads: Target 40-60 SKUs - Soft launch: Complete/in progress - Public launch: On track/complete

Pricing Implementation: - New pricing: Implemented/in progress - Customer response: Track feedback - Revenue impact: Track pricing impact - Adjustment needs: Identify if any

SEO Implementation: - On-page optimization: Complete/in progress - Blog launch: On track - Local citations: Target 20+ by check-in - Review generation: Target 25+ by check-in

Email Marketing: - Subscriber count: Target 800-1,200 by check-in - Automation workflows: Implemented/in progress - Campaign performance: Track metrics - Revenue from email: Track email revenue

Valentine's Campaign: - Campaign launch: On track - Revenue target: Track performance - Email performance: Track campaign metrics - Social media performance: Track engagement

Implementation Support

Ongoing Support Model

Support Channels: - Email support: Ongoing questions and clarifications - Phone support: Scheduled calls as needed - Video calls: Monthly check-ins - Documentation: Updated guides and resources

Support Scope: - Phase 1 deliverables clarification - Implementation guidance - Strategy optimization - Best practices sharing - Resource recommendations

Response Time: - Email: 24-48 hours - Phone: Scheduled within 48 hours - Urgent issues: Same-day response

Resource Access

Documentation: - All Phase 1 deliverables available - Implementation guides - Template libraries - Best practices documents

Tools & Templates: - 50+ Canva templates - Email automation workflows - Corporate gifting templates - SEO optimization guides

Updates: - New resources added as available - Updated templates as needed - Best practices updates - Industry trends sharing

Check-in Preparation

Pre-Check-in Checklist

30-Day Check-in: - [] Review all Phase 1 deliverables - [] Document implementation progress - [] Prepare questions and challenges - [] Gather metrics and data - [] Review action items from submission

60-Day Check-in: - [] Review 30-day check-in summary - [] Update implementation progress - [] Gather performance metrics - [] Prepare optimization questions - [] Review Phase 2 recommendations

Post-Check-in Follow-up

Within 48 Hours: - [] Send check-in summary document - [] Document action items - [] Update implementation timeline - [] Share additional resources as needed

Within 1 Week: - [] Address any outstanding questions - [] Provide additional support as needed - [] Share best practices or resources - [] Schedule next check-in

Communication Schedule

Regular Communication

Weekly (Optional): - Email updates on progress - Quick questions via email - Resource sharing as needed

Bi-Weekly (If Needed): - Progress check-in calls - Strategy discussions - Implementation support

Monthly (Standard): - Formal check-in (30-day and 60-day) - Performance review - Strategy optimization - Next steps planning

Communication Channels

Primary Channels: - Email: Day-to-day communication - Phone: Scheduled calls for discussions - Video: Monthly check-ins - Documentation: Written summaries and guides

Preferred Method: - Email for questions and updates - Phone/video for discussions and reviews - Documentation for formal summaries

Action Item Tracking

Action Item Management

Documentation: - Track all action items from check-ins - Assign ownership and deadlines - Monitor completion status - Update in subsequent check-ins

Follow-up: - Review action items in each check-in - Assess completion status - Identify blockers or challenges - Adjust deadlines as needed

Accountability: - Clear ownership assignments - Specific deadlines - Progress tracking - Completion confirmation

Success Criteria

Phase 1 Success Metrics

Implementation Success: - All Phase 1 deliverables reviewed and understood - Priority actions implemented (corporate gifting, McMaster event, Google Business Profile) - Q1 2026 preparation on track (e-commerce, pricing, SEO)

Performance Success: - Q4 2025 revenue targets met or on track - Corporate gifting launched successfully - McMaster event executed successfully - Email list building progressing

Strategic Success: - Clear path to Q1 2026 e-commerce launch - Pricing implementation planned - Marketing automation progressing - Phase 2 preparation on track

Long-term Relationship

Ongoing Partnership

Phase 2 Support: - Phase 2 implementation support - Ongoing strategy optimization - Performance monitoring - Best practices sharing

Future Phases: - Phase 3 planning support - Long-term growth strategy - Ongoing optimization - Partnership development

Value Delivery: - Continued strategic guidance - Implementation support - Performance optimization - Long-term growth planning

Related Deliverables

- **Executive Summary:** Comprehensive Phase 1 findings
 - **Phase 2 Recommendations:** E-commerce implementation plan
 - **Growth Roadmap:** 12-month execution plan
 - **All Phase 1 Deliverables:** 18 documents for reference
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Next Steps

Immediate Actions (Post-Submission)

1. **Review All Deliverables** - 18 documents ready for review
2. **Prioritize Implementation** - Focus on Q4 2025 priorities
3. **Begin Q1 2026 Preparation** - Start e-commerce planning
4. **Track Progress** - Document implementation progress
5. **Schedule 30-Day Check-in** - Plan follow-up meeting

30-Day Check-in (December 2025)

1. **Review Implementation Progress** - Assess Q4 2025 actions
2. **Discuss Challenges** - Address implementation questions
3. **Plan Q1 2026 Launch** - E-commerce and pricing implementation
4. **Set Next Steps** - Define 30-day action items
5. **Schedule 60-Day Check-in** - Plan next follow-up

60-Day Check-in (January 2026)

1. **Review Performance** - Q4 2025 results and Q1 2026 progress
 2. **Optimize Strategy** - Adjust based on data
 3. **Plan Phase 2** - Discuss Phase 2 priorities
 4. **Set Phase 2 Goals** - Define Phase 2 objectives
 5. **Plan Ongoing Support** - Long-term partnership
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Conclusion

The follow-up strategy ensures successful Phase 1 implementation through structured check-ins, performance tracking, and ongoing support. The strategy maintains alignment with business goals, optimizes implementation based on data, and supports long-term growth planning.

Key Takeaways: 1. Structured 30-day and 60-day check-ins 2. Comprehensive KPI tracking 3. Ongoing implementation support 4. Long-term partnership focus

Ready for: - Post-submission support - Implementation guidance - Performance optimization - Long-term growth planning

Next Steps: Schedule 30-day check-in

Document Status: Complete

Prepared for: Dan Edwards & Dale, Chocolat on James

Submission Date: November 2025

Ready for Implementation: Yes